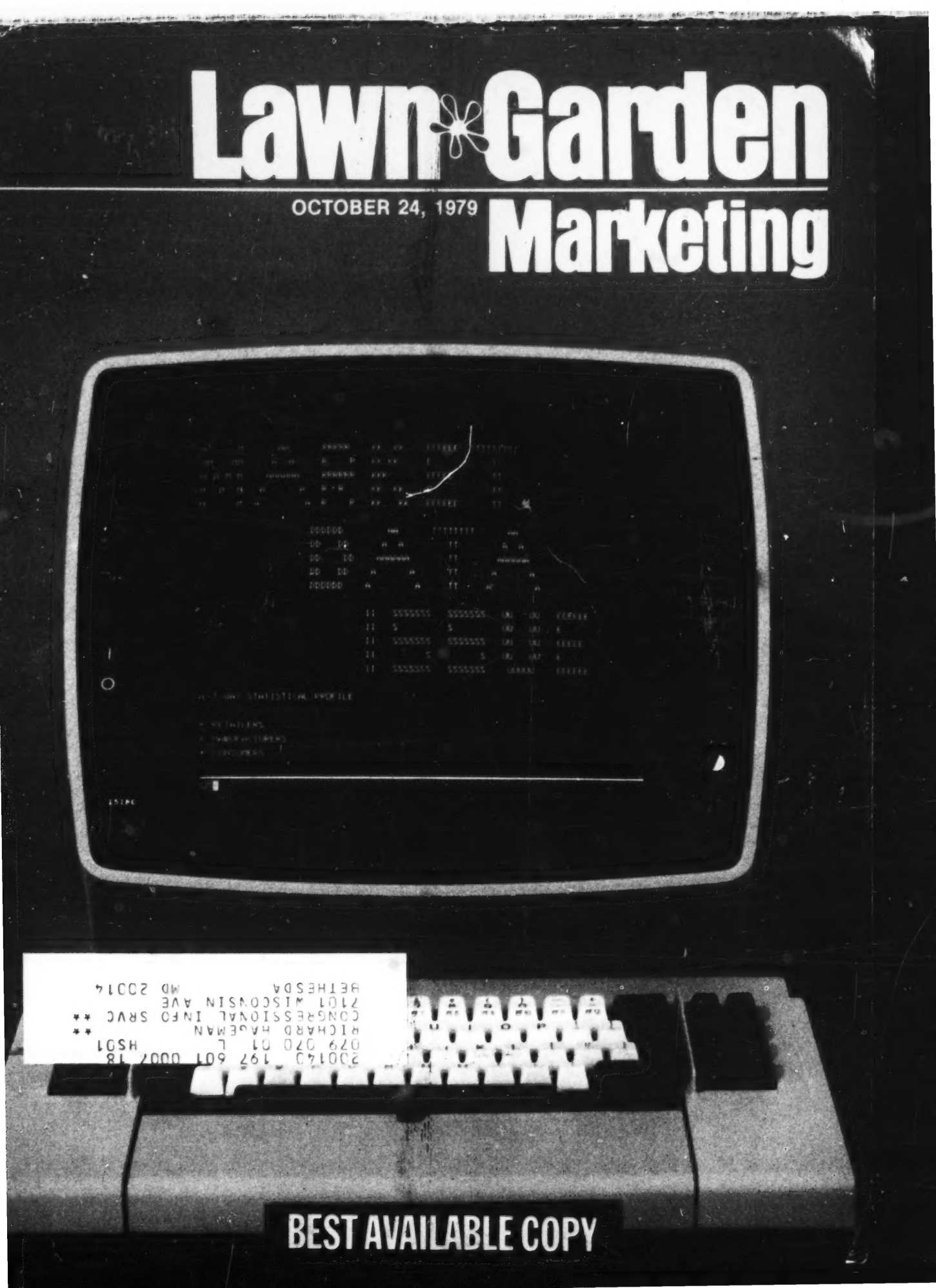
Lawn & Garden Marketing

OCTOBER 24, 1979



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The merchandising magazine for lawn, garden and leisure living products

Lawn & Garden Marketing

OCTOBER 24, 1979 • VOL. 18 • NO. 9 • PUBLISHED 10 TIMES ANNUALLY*

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Matching computers to power equipment parts business. This is the first in a series of articles about lawn and garden distributors and retailers who use computers.

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From LGM research

Profile of change: Retailers diversify at quickened pace

More aggressive marketing on the part of manufacturers and the rapid adoption of work-saving and leisure living products by the public are reflected at the retail level in the types of merchandise displayed. New products are catching on fast with the retailers and the public they serve.

Table 1—Changes in distribution patterns of 10 product groups

MM = Mass Merchandisers
GC = Garden Centers
HH = Hardware/Home Centers
PE = Power Equip. Specialists

	Total All retail		MM		GC		HH		PE	
	'78 %	'79 %	'78 %	'79 %	'78 %	'79 %	'78 %	'79 %	'79 %	'79 %
Product groups handled										
Nursery stock—Indoor plants, seed, sod, bulbs, etc.	(1)	60.2	74.8	70.0	65.4	70.7	72.2	61.4	NA	16.3
Garden tools—Shovels, rakes, sprayers, edgers, shears, carts, etc.	71.6	77.2	90.7	92.0	74.2	76.4	93.5	99.1	27.4	43.5
Outdoor living accessories/decor—Outdoor cookery, patio furniture, lighting, fountains, spas, hot tubs, swimming pool supplies, etc.	(1)	46.5	64.2	76.2	42.6	40.3	73.2	64.4	NA	14.6
Power equipment—Engine, electric, cordless. Includes accessories/parts	67.2	80.8	76.2	86.5	48.6	68.8	80.6	96.0	100.0	100.0
Watering equipment—Sprinklers, hose fittings, irrigation systems, etc.	(1)	74.3	91.4	92.7	70.0	73.5	95.4	98.9	NA	34.0
Garden chemicals	(1)	69.9	86.8	84.6	71.4	73.6	88.9	92.2	NA	21.3
Fertilizers/liming materials	(1)	68.7	84.8	78.6	73.5	73.2	87.0	91.1	NA	22.6
Garden supplies—Mulches, soil amendments, edging, gloves, etc.	(1)	73.8	86.8	86.4	63.3	78.1	92.6	94.9	NA	23.4
Indoor plant accessories—Pots, plant food, potting soils, etc.	(1)	67.1	72.2	87.6	57.6	68.0	63.0	93.6	NA	15.3
Complementary products—Wood-burning stoves, pet supplies, etc.	(2)	48.5	(2)	69.2	(2)	34.7	(2)	81.9	(2)	26.7

(1) Not comparable because additional retailing category, power equipment specialists, is being included in additional categories in 1979.
(2) Data not collected in 1978.
NA = Not applicable.

Table 2—Distribution of monofilament trimmers

(Percentage of retailers handling)

	Total		MM		GC		HH		PE	
	1978	1979	1978	1979	1978	1979	1978	1979	1978	1979
Monofilament trimmers	45.4	67.5	62.3	76.7	36.0	57.1	50.9	89.0	85.2	69.4
Gasoline	.....	48.4	.....	52.7	.....	41.3	.....	59.6	.....	54.2
Electric	.....	58.7	.....	71.3	.....	50.0	.....	78.9	.....	54.2

Source: 1979 Lawn & Garden Marketing survey.

monofilament trimmers ve helped attract ore retailers to handling power quipment.

■Presented here are some of the highlights of the 1979 **Lawn & Garden Marketing** survey of retailers. There are some obvious new bulges in the profile: The monofilament trimmer, for example, provides a distinct change in the look of the product mix for some lawn and garden retailers. However, one of the most notable aspects of the 1979 survey can be seen when its Products Handled column (see Table 1) is compared with the same column for 1978. That comparison shows that retailers listed in the table are all broadening their product mix. It also shows that the differences between types of retailers, based on merchandise lines handled, is narrowing. Both the specialty lawn and garden retailers and the various categories of mass retailers—discount houses, hardware/home centers, etc.—have broadened their lines of merchandise.

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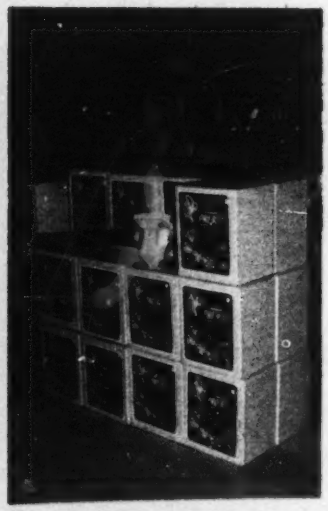
New products are helping to change the profile of lawn/garden/patio retailers. The net result is that all types of retailers are offering more diverse types of merchandise to increased numbers of customers.



New products are gaining broad distribution faster.

Table 3A—Power equipment service offered

	Total %	MM %	GC %	HH %	PE %
Operate a service department	52.9	30.2	29.2	51.4	95.6
Services provided:					
Service only equipment sold by retailer	43.1	63.9	47.9	61.2	33.3
Service all brands regardless of where purchased	56.9	36.1	52.1	38.8	66.6
Actively solicit service/repair business	28.8	12.8	17.1	23.2	37.4

Retailers' profile

...continued

1979 lawn and garden retailing profile

Spin trimmers led all lawn and garden product categories in 1979 in the competition to gain space on the sales floors of the country's retailing companies. This dramatic gain in trimmer distribution (a 49 per cent increase in the number of retail outlets handling the product) brought distribution of these units up to the same level as walk-behind mowers: 67 per cent.

This gain was the most significant of all changes in the profile of lawn and garden products revealed in the 1979 annual survey conducted by **Lawn & Garden Marketing.** It is consistent with the increased interest shown by the public in lightweight, dependable, easy-to-handle, labor-saving equipment used to care for lawns and gardens.

Another manifestation of this trend was shown in the survey: More retailers are handling non-powered gardening tools. The demand for these tools is apparently growing alongside the demand for the gas- and electric-powered spin trimmers. In addition to the digging and cutting tools, one other product in this category—carts—is showing steady growth in importance with the gardening public and with retailers.

Effects of weather

Meanwhile, distribution of some other product categories has shown the effects of weather conditions, consumer demand and short supply. Watering equipment dropped from 81 per cent of retailers handling the category in 1978 to 74 per cent in 1979. This drop was thought to be partly due to the easing of the drought conditions on the West Coast and less demand by consumers for watering devices. There was a significant drop in the number of retailers handling faucet-mounted water timers from 1978 (36 per cent) to 1979 (18 per cent).

The weather-related increase in the price of grass seed for the spring 1979 market put a damper on retailer enthusiasm for this product category. Prices and availability of high quality plants also had an effect on mass merchants' decisions to stock green goods in 1979.

Newsmakers and subtle changes

Nursery products and walk-behind mowers, not surprisingly, are the lawn and garden items that form the broadest foundation for sales volume by most lawn and garden retailers.

This year's survey asked the retailers which products they thought

continued on page 52

Table 3B—Mechanics staffing service departments

	Total %	MM %	GC %	HH %	PB %
Total number of mechanics employed					
One	24.7	25.6	31.5	45.6	16.9
Two	27.3	40.9	30.3	23.5	24.6
Three or four	27.3	26.7	22.4	21.3	37.4
Five or more	21.0	7.8	15.8	9.6	21.1
Full-time mechanics					
One	40.2	50.1	50.7	58.9	30.8
Two	33.2	32.4	29.4	25.0	38.6
Three or four	16.6	11.7	13.4	8.9	19.1
Five or more	10.1	5.8	7.5	9.2	11.5
Seasonal mechanics					
One	64.3	75.0	66.7	68.0	54.1
Two	25.0	25.0	25.0	28.0	33.3
Three or more	8.8	.....	8.3	4.0	12.6
Apprentice mechanics					
One	82.0	88.9	91.6	33.3	77.5
Two	14.0	11.1	4.2	66.7	17.7
Three or more	4.0	.....	4.2	.....	4.8

Table 3C—Wages paid to mechanics

Average hourly wage	Total %	MM %	GC %	HH %	PB %
Full-time mechanics					
Less than $4.00	13.5	12.1	13.9	21.8	11.8
$4.00 to $4.99	27.4	33.3	36.2	20.7	26.4
$5.00 to $5.99	32.8	24.2	32.2	47.9	33.7
$6.00 to $6.99	15.0	15.2	16.9	5.4	16.3
$7.00 or more	11.2	15.2	10.8	5.4	11.8
Median =	$5.38	$5.19	$5.31	$4.86	$5.36
Seasonal mechanics					
Less than $3.00	9.2	.....	10.9	10.5	9.8
$3.00 to $3.99	38.6	39.7	34.8	39.6	43.2
$4.00 to $4.99	32.4	46.6	30.4	21.1	33.7
$5.00 to $5.99	13.0	20.0	17.4	21.1	8.7
$6.00 or more	6.5	6.7	6.5	10.5	4.6
Median =	$4.06	$4.60	$4.14	$4.13	$3.91
Apprentice mechanics					
Less than $3.00	39.4	10.0	25.9	20.0	51.3
$3.00 to $3.99	52.9	40.0	41.7	60.0	37.7
$4.00 to $4.99	14.7	20.0	26.0	20.0	9.4
$5.00 or more	3.0	20.0	.....	.....	1.6
Median =	$3.39	$4.00	$3.40	$3.60	$3.32

Source: 1979 Lawn & Garden Marketing survey

Circle (15) on Reply Card ——→

Retailers' profile

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would make sales news in 1979. Leading all categories was a product that predates even lawn mowers: nursery products.

Twenty-four per cent of the respondents in the survey thought that nursery products would make sales news; 22 per cent thought that monofilament trimmers were newsmakers in the industry; and 19.7 per cent thought that lawn mowers would make sales news.

It is the addition of the monofilament trimmers to the category of outdoor power equipment that boosted that category to an all-time high of 81 per cent of retailers carrying power equipment. This outranks all of the nine other product categories of merchandise in terms of being widely distributed.

Although it has come about gradually, one thing that shows up on this year's survey is the increased percentage of power equipment specialists who remain power equipment specialists but who have added other product categories to their merchandise offering to the public.

Power equipment servicing

How well are retailers of outdoor power equipment prepared to service their customers? As a beginning step in analyzing the current state of this important segment of the lawn and garden industry, the 1979 **Lawn & Garden Marketing** survey asked retailers to report on the number of mechanics they employ, wage rates, etc. The answers are provided here.

Slightly more than half—53 per cent—of lawn and garden retailers operate a service department. Approximately 57 per cent of those with a service department service all brands, although mass merchandisers and hardware/home centers tend to service only equipment that is sold by them. About 29 per cent actively solicit service and repair business. Mass merchandisers solicit less than other retailers, power equipment specialists more than others.

Mechanics on payroll

Retailers employ more full-time mechanics than seasonal or apprentice mechanics. Power equipment specialists hire apprentice mechanics more often than other retailers; hardware/home centers hire apprentices less often than others.

About 54 per cent of retailers employ two, three or four mechanics. Hardware/home centers usually employ one mechanic, garden centers one or two, mass merchandisers two and power equipment specialists three or more. Power equipment specialists tend to employ two full-time mechanics while other retailers employ one.

The median hourly wage paid to full-time mechanics is $5.28; hardware/home centers pay the least—$4.95—and power equipment specialists pay the most—$5.35. Seasonal mechanics are paid an average of $4.06; apprentices command the lowest salary, an average of $3.38. Power equipment specialists pay least for seasonal and apprentice mechanics; mass merchandisers pay most. □

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New consumer data

Lawn, garden activities take upswing in '79

■Preliminary data from the annual consumer survey taken by the Gallup Organization, and sponsored by Gardens for All/The National Assn. for Gardening, show increased public interest in most types of lawn and garden activities in 1979 compared with 1978.

The survey shows an increase of more than 14 per cent of U.S. households involved in lawn care activities in 1979 compared with last year. This translates to 44 million households involved in lawn care activities in 1979.

The survey also showed increased activities by homemakers in flower gardening, indoor houseplant care and vegetable gardening.

Forty-two per cent of the households were involved in home vegetable gardening in 1979 compared with 41 per cent in 1978. Gardens for All, a non-profit organization headquartered in Burlington, Vt., thinks the increase to 33 million vegetable gardeners this year, compared with the 31 million in 1978, is due to the public's interest in cutting expenditures for food. The data gained in this year's survey showed reversal in the decline in percentage of households with vegetable gardeners since the 1975 peak. That year, 49 per cent of households raised their own vegetables.

The 1975 gardening surge came on the heels of the first oil/gasoline crisis and sharp increases in prices of food and other consumer products.

The 1979 increase in vegetable gardening did not take place in all parts of the country. In fact, two geographic areas with high concentrations of population, the East and the Far West, showed decreases in percentages of gardening households. The Midwest and the South both showed increases in vegetable gardening.

The median size of the gardens in 1979 was 595 square feet, compared with 620 square feet in 1978. Data indicated a correlation between some types of vegetables that have surged in price in the supermarkets—asparagus and broccoli, for example—and the gain in popularity of those vegetables in home gardens.

Gardens for All estimates that the total retail value of the production in home gardens this year is $13 billion. This is an average yield per garden of $386.

Purchases by the public of tools, equipment and supplies to produce and preserve their vegetables was

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Lawn and garden activities—1978-1979

	Lawn care		Flower gardening		Indoor houseplants		Fruit/berry growing		Vegetable gardening	
	1978 %	1979 %	1978 %	1979 %	1978 %	1979 %	1978 %	1979 %	1978 %	1979 %
Total U.S.	49	56	34	38	44	45	24	22	41	42
Men	56	63	28	31	28	31	31	48	42	43
Women	44	50	40	45	59	58	23	52	41	42
18-29 years	45	52	27	29	50	46	18	20	34	36
30-49 years	52	63	38	43	45	49	28	35	42	43
60 and over	50	53	38	41	41	41	27	51	46	46
East	46	43	35	34	44	45	15	17	38	33
Midwest	57	66	37	45	50	48	28	34	50	56
South	47	56	28	34	36	37	19	26	37	41
Far West	46	60	39	42	50	54	40	45	39	37
College	57	67	40	46	55	57	30	36	44	47
High school	50	54	34	36	45	43	24	27	40	39
Grade school	36	42	26	31	26	29	19	22	42	41
Professional	64	66	45	47	57	60	32	36	45	47
Business	60	67	41	43	64	53	26	42	40	44
Clerical & sales	44	47	31	35	40	53	16	17	31	30
Manual	46	55	28	33	42	42	21	26	39	40
Non-labor force	42	50	39	39	35	38	24	31	42	45

Source: Gardens for All/Gallup Organization Survey.

Relationship of incomes and activities

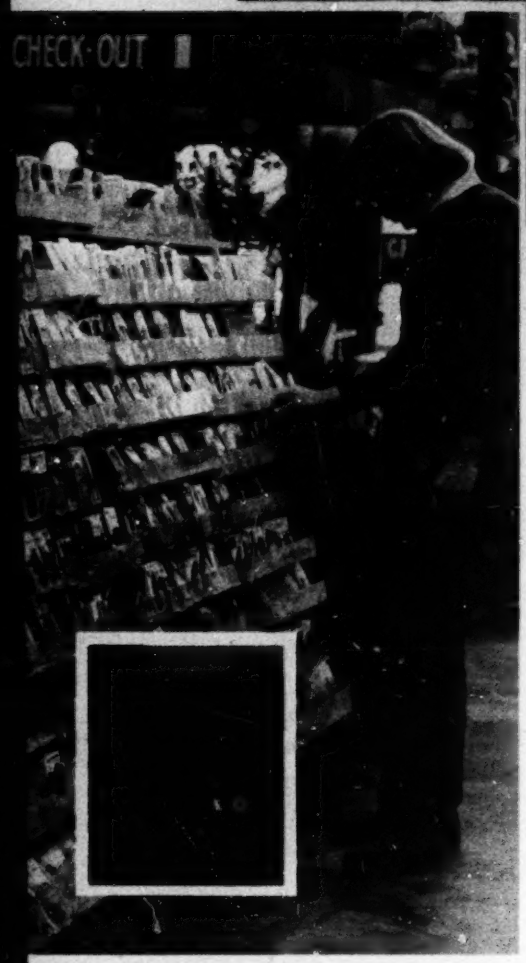
(Incomes of households' principle wage earners)

Annual income	Lawn care	Flower gardening	Indoor houseplants	Fruit/berry growing	Vegetable gardening
Over $20,000	68%	48%	53%	46%	50%
Under $20,000	50	34	42	33	38

Source: Gardens for All/Gallup Organization Survey.

Indoor plants is an activity that continues to attract all age groups. According to the survey, there were only slight changes in percentages of households with indoor plants in 1979 compared with 1978.

Fifty-six per cent of U.S. households were involved in lawn care activities in 1979.



Vegetable gardening in the United States made a gain in popularity in 1979—42 per cent of the households said they were raising vegetables, compared with 41 per cent in 1978.

Consumers

continued from page 25

projected to be $2 billion.

The number of flower gardeners increased from 34 per cent of households to 38 per cent of households. Indoor houseplants are holding their own: 45 per cent of the households had house plants in 1979, compared with 44 per cent in 1978.

It was only in the East that there was a decrease in lawn care activities. The change was from 46 per cent of respondents indicating they were active in 1978 to 43 per cent in 1979.

The Far West jumped from 46 per cent of households being active in lawn care activities in 1978 to 60 per cent in 1979.

The figures show that a greater percentage of college-educated respondents and those in business and professional careers are engaged in lawn and gardening activities than are those with less formal education and those in clerical work or manual labor. The survey also shows how the income of the principle wage earner relates to involvement in lawn and garden activities.

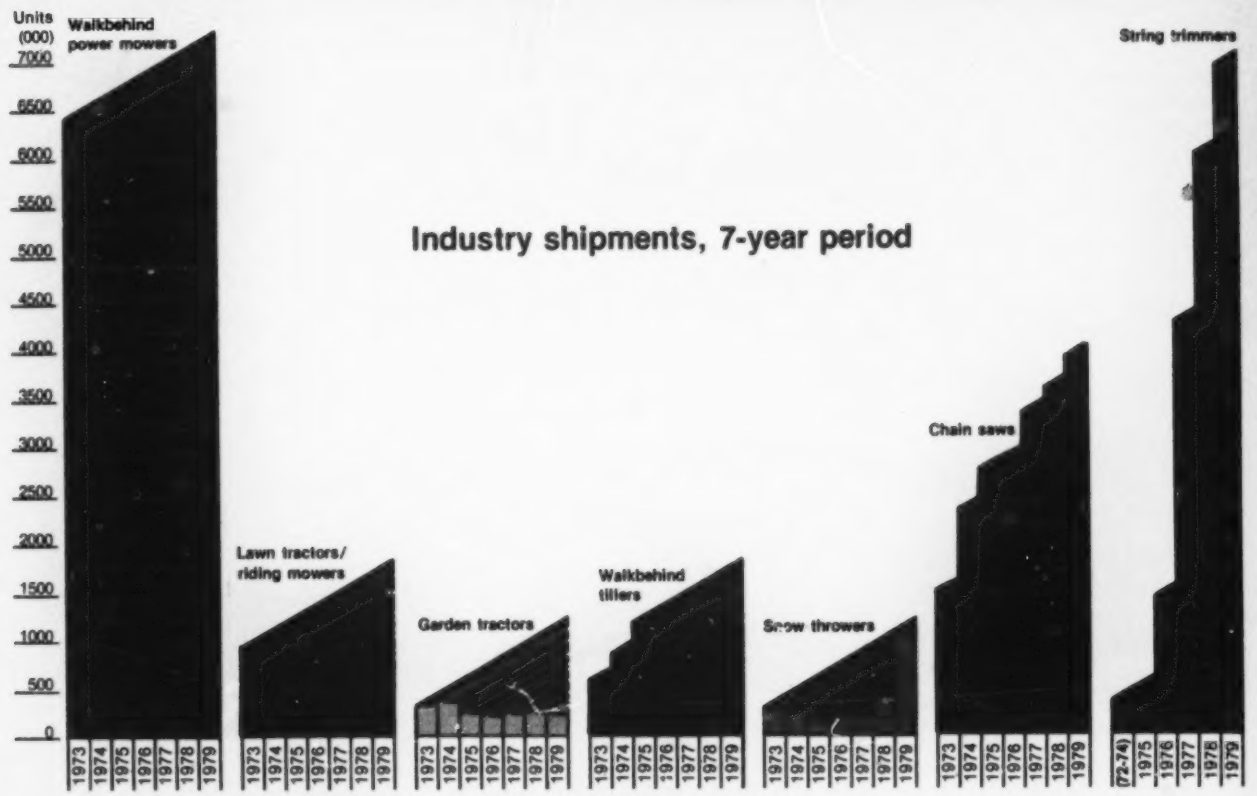
The respondents in the younger of the three age brackets listed in the survey report—18-29 years of age—showed an increase in all of the classifications of gardening except for indoor gardening. In 1978, 50 per cent of the 18-29 year age bracket included the care of indoor plants as one of their activities. This year, however, the percentage of respondents in this age bracket who had indoor plants was lower. However, this younger group showed increased activity in all other lawn and garden activities.

The survey showed that a high percentage of retired persons are involved in vegetable gardening.

This year's survey, conducted by the Gallup Organization, was much more comprehensive than Gallup's previous surveys of lawn and garden activities. The 150-page report goes into detail about many facets of gardeners' activities in 1979, and also future gardening plans. □

For detailed report

For those desiring to obtain key findings of *The 1979 National Gardening Survey* we are listing here the address to write for information: Gardens for All/ National Assn. for Gardening, 180 Flynn Ave., Burlington, VT 05401.



Industry shipments, 7-year period

Sources: OPEI; Simplicity Manufacturing Co.; Chain Saw Manufacturers Assn. and industry data.

Profile of change: manufacturers

Statistical data presented here show production, shipments and forecasts from several segments of the manufacturing industries that supply products coming under the heading *"Lawn and garden"* at the retail level. The data show a constantly changing profile. Above all, the statistics show that the lawn and garden industry has become a more readily recognized and important segment of the economy.

■We are only now beginning to reap the benefits of a project started for the 1972 Economic Census: defining lawn and garden equipment as a separate industry. Before 1972, lawn and garden equipment was grouped with farm machinery and equipment in the census report. This made it impossible to get a precise grasp on

continued...

Equipment manufacturers' profile—5 years

Year	All establishments — Total (number)	All establishments — With 20 employees or more (number)	All employees — Number (1,000)	All employees — Payroll (million dollars)	Production workers — Number (1,000)	Production workers — Hours (millions)	Production workers — Wages (million dollars)	Value added by manufacture (million dollars)	Cost of materials (million dollars)	Value of shipments (million dollars)	Assets and expenditures — New capital expenditures (million dollars)	Assets and expenditures — Gross value of fixed assets (million dollars)	Assets and expenditures — End-of-year inventories (million dollars)
1977 Census	150	91	19.3	220.4	14.4	27.2	139.8	626.6	937.0	1,562.3	28.4	314.6	378.5
1976 ASM[1]	(NA)	(NA)	18.7	207.1	13.8	27.3	134.8	534.2	862.2	1,400.6	33.2	288.9	359.8
1975 ASM[1]	(NA)	(NA)	19.6	202.8	14.1	27.6	131.8	466.6	832.4	1,352.7	46.1	268.2	373.0
1974 ASM[1]	(NA)	(NA)	25.3	232.1	19.1	36.6	156.5	646.4	998.0	1,562.9	40.8	280.4	500.7
1973 ASM[1]	(NA)	(NA)	21.7	193.6	16.5	32.2	129.7	468.5	738.6	1,174.1	29.2	240.5	305.4
1972 Census	110	86	20.7	165.5	15.1	29.3	108.3	453.2	652.2	1,059.1	47.6	228.0	287.2

(NA) Not available.

[1]In years of Annual Survey of Manufactures (ASM), data are estimates based on a representative sample of establishments canvassed annually and may differ from results of a complete canvass of all establishments. ASM publication shows percentage standard errors. This industry was first defined for 1972 Census of Manufactures, so no data prior to 1972 exist.

Source: 1977 Census of Manufactures; U.S. Dept. of Commerce; Bureau of the Census.

Manufacturers' profile ...continued

Lawn and garden equipment shipments, 1972 census

Product	Number of companies with shipments of $100,000 or more	Product shipments[1] Quantity[2]	Value (million dollars)
Garden tractors and motor tillers:			
As reported in the census of manufactures	(X)	(X)	321.1
As reported in Current Industrial Reports MA-35A, Farm Machinery and Equipment	(X)	(X)	291.4
Garden tractors, except motor tillers:			
Riding type:			
Under 7.0 engine hp	(X)	70,858	37.4
7.0 and under 10.0 engine hp	(X)	103,521	79.9
10.0 and under 14.0 engine hp	(X)	65,392	61.1
14.0 engine hp and over	(X)	89,022	19.1
Walking type:			
Under 7.0 engine hp	(X)	307,909	34.4
7.0 engine hp and over	(X)	25,881	4.1
Motor tillers:	(X)	(X)	55.5
Under 6 engine hp	(X)	(X)	550.2
6 engine hp and over	(X)	191,500	6.8
Attachments for garden tractors			
Lawn mowers and snow blowers			
Hand (reel type) lawn mowers			
Power lawn mowers:			
Reel type:			
Nonriding	(X)	81,700	9.1
Integral riding, with fixed or floating mower	(X)	235,200	37.3
Rotary type:			
Hand traction	(X)	3,473,700	193.6
Power traction:			
Nonriding	(X)	843,800	80.8
Integral riding, with fixed or floating mower	(X)	447,800	105.9
Snow blowers and snow throwers, single purpose residential only, excluding large commercial type units	(X)	353,500	52.8
Other, including gang-cutting units, sickle-bar mowers shipped as complete units, lawn edgers and special cutting units	(X)	381,800	27.2
Attachments for lawn mowers, snow blowers and similar equipment	(X)	(X)	28.3
Lawn mowers and snow blowers, n.s.k.	(X)	(X)	8.4
Parts for lawn and garden equipment, for sale separately	(X)	(X)	269.6
Hedge trimmers and shears, power	(X)	(S)	43.3
Parts sold to plants producing farm equipment (original equipment):			
Parts for garden tractors and motor tillers	(X)	(X)	24.8
Parts for hedge trimmers and shears, power	(X)	(X)	.....
Parts for lawn mowers and snow blowers	(X)	(X)	141.0
Parts for replacement and repair:			
Parts for lawn mowers and snow blowers	(X)	(X)	33.2
Parts for garden tractors and motor tillers:			
As reported in the census of manufactures	(X)	(X)	24.5
As reported in Current Industrial Reports MA-35A, Farm Machinery and Equipment	(X)	(X)	19.6
Parts for hedge trimmers and shears, power	(X)	(X)	2.8
Lawn and garden equipment, n.s.k., typically for establishments with 5 employees or more (see note)	(X)	(X)	2.5
LAWN AND GARDEN EQUIPMENT			
Total	**(X)**	**(X)**	**1,143.4**

- Represents zero. (S) Withheld because estimate did not meet publication standards. (X) Not collected. (NA) Not available. n.s.k. Not specified by kind.

[1]For 1977, quantity and value reported by all producers of product, not just those with shipments of $100,000 or more.

[2]For some establishments, data have been estimated from central unit values, which are based on quantity-value relationships of reported data. The following symbols are used when percentage of each quantity figure estimated in this manner equals or exceeds 10 percent of published figure: *indicates 10 to 19 percent estimated, **indicates 20 to 29 percent estimated. If 30 percent or more is estimated, figure is replaced by (S).

[3]1977 Current Industrial Reports MA-35A, Farm Machinery and Equipment, reports rotary garden (motor) tillers and 2-wheel walking type tractors combined, as 500,825 units valued at $119.0 million.

Source: 1977 Census of Manufactures; U.S. Dept. of Commerce; Bureau of the Census.

Lawn and garden equipment shipments, 1977 census

Product	Number of companies with shipments of $100,000 or more	Product shipments[1] Quantity	Value (million dollars)
Consumer nonriding lawn, garden and snow equipment	(X)	(X)	834.3
Lawn mowers:			
Reel, push type, nonpowered	4	121,500	3.1
Reel, push type, gasoline engine powered	8	209,300	26.7
Rotary, push type, gasoline engine powered	30	3,069,200	253.1
Rotary, self-propelled, gasoline engine powered	21	841,100	108.3
Electric, all types, including battery powered	4	170,100	16.9
Rotary garden (motor) tillers[3]	25	508,300	123.7
2-wheel tractors, walking type, except rotary tillers[3]	4		
Snow throwers (snow blowers), except attachment types:			
Single stage	9	244,200	37.9
Dual stage	13	147,000	50.9
Powered lawn edger/trimmers:			
Fixed blade, gasoline engine powered	8	2,207,700	57.6
Fixed blade, electric	3		
Other than fixed blade	9	6,036,600	112.9
Shredders and shredder-grinders	6	15,900	3.4
Powered hedge trimmers	1	(D)	.....
Yard vacuums and blowers	14	41,500	11.6
Lawn sweepers, push type and powered, except attachment type	4	89,500	5.0
Other consumer nonriding lawn, garden and snow equipment	10	(X)	22.8
Consumer nonriding lawn, garden and snow equipment, n.s.k.	(NA)	(X)	0.4
Parts and attachments for consumer nonriding lawn, garden and snow equipment	(NA)	(X)	102.4
Parts	46	(X)	69.6
Attachments	19	(X)	32.8
Parts and attachments for consumer nonriding lawn, garden and snow equipment, n.s.k.	(NA)	(X)	
Consumer riding lawn, garden and snow equipment	(NA)	(X)	577.3
Lawn tractors and riding mowers:			
Front engine:			
Under 6.0 hp	5	57,900	19.2
6.0 hp and over	19	403,100	175.7
Rear engine:			
Under 6.0 hp	14	119,300	43.8
6.0 hp and over	14	136,800	64.8
Garden tractors:			
Under 10.0 hp	6	13,100	12.1
10.0 hp to 13.9 hp	16	70,000	88.5
14.0 hp to 15.9 hp	13	33,100	51.8
16.0 hp to 19.9 hp	15	68,600	105.7
20.0 hp and over	1	*107,100	15.7
Other consumer riding lawn, garden and snow equipment	3		
Consumer riding lawn, garden and snow equipment, n.s.k.	(NA)	(X)	
Parts and attachments for consumer riding lawn, garden and snow equipment	(NA)	(X)	198.8
Parts	39	(X)	126.7
Attachments:			
Rotary mower decks	11	106,400	25.0
Rotary tiller attachments	12	*30,400	9.4
Blades, dozer	12	49,500	5.8
Snow throwers	11	19,700	5.3
Carts and wagons	7	*25,000	3.0
All other attachments	19	(X)	23.6
Parts and attachments for consumer riding lawn, garden and snow equipment, n.s.k.	(NA)	(X)	
Lawn and garden equipment, n.s.k., typically for establishments with 5 employees or more (see note)	(NA)	(X)	15.8
Lawn and garden equipment, n.s.k., typically for establishments with fewer than 5 employees (see note)	(NA)	(X)	10.7
LAWN AND GARDEN EQUIPMENT Total	**(X)**	**(X)**	**1,739.3**

Source: 1977 Census of Manufactures; U.S. Dept. of Commerce; Bureau of the Census.

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Manufacturers' profile

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statistics relevant to the industry as a whole.

On the previous two pages we are publishing both the 1977 and 1972 lawn and garden shipments from the Census of Manufactures. By comparing the two it can be seen that the profile of the lawn and garden equipment manufacturer is a changing one.

The table at the bottom of page 38, *Equipment manufacturers' profile—5 years,* gives statistical information about the industry, but not about specific product lines.

For example, the total number of all establishments in this industry has increased from 110 in 1972 to 150 in 1977. It can also be seen that most manufacturing companies have 20 employees or more. The number of employees, however, has dropped from 1972. The 1977 census report shows 19,300 people employed in 1977, compared with 20,700 in 1972. That is a 7 per cent drop in the number employed in the industry.

The value of shipments for establishments classified in the lawn and garden industry has increased by 48 per cent since 1972. That year's figure was $1,059.1 million, compared with $1,562.3 million in 1977.

One product that accounts for a significant part of that increase is the power push-type lawn mower—shipments have increased by 43 per cent in this 5-year period.

1977 statistics more detailed

The tables on the previous two pages, *Lawn and garden equipment shipments, 1977 census* and *Lawn and garden equipment shipments, 1972 census,* give a detailed account of different lawn and garden products. Both tables show the number of companies with shipments of $100,000 or more, the quantity of product shipments and the value (in million dollars) of the product shipments. By comparing the 1977 table with the one for 1972 it is clear that the 1977 statistics offer a much more detailed profile; product categories are classified in greater detail.

One example of this is seen in the first heading of the 1977 census: *Consumer non-riding lawn, garden and snow equipment.* Lawn mowers (the next line down) have been classified in five divisions, and the titles given to the divisions make them easier to match to the product as it is known. This compares favorably with how the product was listed in the 1972 census.

In the 1972 census, lawn mowers and snow blowers are the second main category listed (about one-third down the table). Classifications do not distinguish between gasoline-powered mowers and electric- and battery-powered mowers. Also, there is no separate classification for self-propelled units. In the comparison between the 1972 and 1977 lawn mower statistics, it can be seen that as the power equipment industry becomes larger and more complex, better and more detailed statistics are needed, and they have been provided in the 1977 census.

In the comparison between the 1972 and 1977 lawn mower statistics, it can be seen that as the power equipment industry becomes larger and more complex, better and more detailed statistics are needed, and they have been provided in the 1977 census.

Snow throwers, according to the 1972 census, had product shipments totaling 353,500 units with a value of $52.8 million. In the 1977 census, this product category showed total shipments (single and dual stage) of 391,200 units valued at $88.8 million.

Those putting their money on this product held winning tickets: The snow thrower market continued to expand at a torrid pace throughout the 1978-79 season. That season saw shipments of 416,000 units. During the year ending Feb. 28, 1979, a record 1,118,000 snow throwers were shipped.

Parts and attachments

Parts and attachments are another area in which the 1977 census indicates the growth of the lawn and garden equipment industry not only in terms of volume, but also as an industry that has a need for definite, revealing statistics.

In the 1972 census, the line reading *Parts for lawn mowers and snow throwers* shows a value of $33.2 million. In the 1977 census, this category is handled much differently. Notice that under the heading *Parts and attachments for consumer non-riding lawn, garden and snow equipment* come the subheadings *Parts, Attachments* and *Parts and attachments not specified by kind [n.s.k.].* Farther down the page is the heading *Parts and attachments for consumer riding lawn, garden and snow equipment.* Here the different categories are classified for easy identification.

The 1977 census classifies consumer riding lawn, garden and snow equipment in three categories, the two key ones being *Lawn tractors and riding mowers* and *garden tractors.* The 1972 census reported statistics on garden tractors but not on lawn tractors. Classification by horsepower is more segmented in the 1977 report, reflecting the increased types of models manufactured for various needs.

According to figures from another report, "Outdoor Power Equipment Industry Outlook 1980," lawn tractors and riding mowers had shipments of 750,000 in 1978, a projected 746,000 for 1979 and a forecast of 768,000 for 1980. Garden tractors showed shipments of 219,000 for 1978, a projected 210,000 for 1979 and a forecast of 217,000 for 1980. So after a slide in 1979, the garden tractor market should move uphill in 1980.

Growth categories

String trimmers and mulching mowers are product categories that, according to the Department of Commerce, Industry and Trade Administration, have the highest growth rate of all products in the lawn care machinery industry.

Industry sources show that from 1972-74, shipments of string trimmers were approximately 300,000 to 400,000—most of them electric models. In 1975 shipments were 323,000; electric trimmers took a 96 per cent share of the market. The shipments almost tripled in 1977—4,300,000 were shipped (96 per cent electric). 1978 and 1979 continued

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Manufacturers' profile

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to show significant gains with 6,000,000 and 6,900,000 shipments, respectively. In 1978, gas-powered string trimmers finally grabbed a bigger part of the market share—5.8 per cent of the total shipments.

The outlook

Growth for the lawn and garden machinery industry looks good, and product shipments, according to the Department of Commerce, should increase at a compound annual rate of 7.8 per cent from 1978 to 1983.

Several factors will greatly influence the market. One is the ability of the industry and government to deal effectively with proposed safety and noise standards and with the increasing cost of components.

Also influencing this industry's growth are personal disposable income and the rate of new, single-family housing starts. □

Lawn & Garden Marketing

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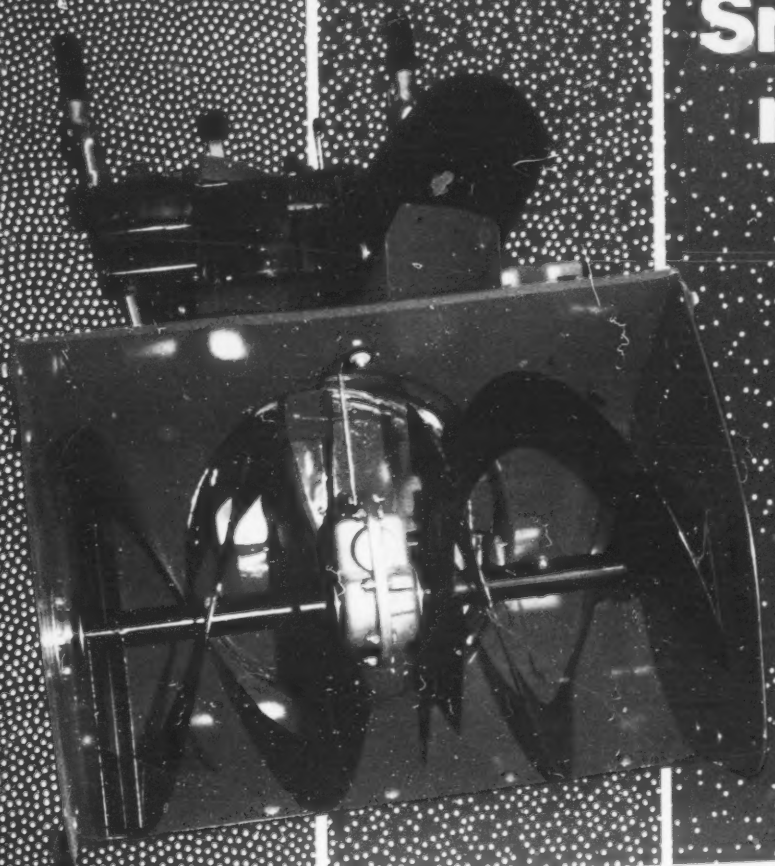

Snow or no!

Snow thrower marketing strategy

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Snow thrower marketing strategy

part 1 Retailers struggle with holdover inventory

by Wendall J. Burns

For this annual report on the snow thrower business, we surveyed and interviewed those most deeply affected by the lack of snow—a group of outdoor equipment specialty retailers serving the Chicago market. We also interviewed some mass retailers and top executives of manufacturers of walk-behind snow throwers.

■Feast or famine. That is a dilemma not completely new to the snow thrower business.

One year ago there was a clamor for more merchandise. There was also a problem of back orders. Now there is quiet consternation over holdover inventory.

It began with a clamor from the public, especially in the Chicago area where record snow tied up the city for weeks in the 1978-79 winter. The clamor was transmitted through retailers and distributors to the manufacturers.

The stage was set for a boom 1979-80 selling season! As a matter of fact, the sales year just completed was indeed either the highest, or next-to-highest, ever in terms of units sold, according to the manufacturers.

However, sales at retail level did not reach the boom stage anticipated. The snowfall was late and/or light in most major metropolitan markets in the snow belt. Moreover, even though the manufacturers were gearing up for a boom, some deliveries to retailers did not arrive until after even the normal peak selling season.

"I could have sold them if I had had them in August, September or October," said Charlie McNamara, owner of Highway Sales in Addison, a Chicago suburb. "But, some of them came from the factory after Christmas, and the green grass was still showing," he said.

When Highway Sales' final shipments came in after Christmas, McNamara said, he called customers who had given him deposits on snow throwers. Many simply requested the return of their deposit money. Others told him they had already gone elsewhere to make their purchases.

But there is still a big market out there, say many of the dealers and most of the manufacturers.

"Look," said McNamara, "many of those people who came in and

part 2 Manufacturers report 500,000 units in the field; give overview

■A survey of its members by the Outdoor Power Equipment Institute at the end of the model year just completed showed that of the 1,600,000 units shipped, there were approximately 500,000 walk-behind snow throwers which had not been sold to the public. They are still in the hands of the distributors and dealers. Approximately 80 per cent of the units held over are single-stage units. This survey of the OPEI members showed also that

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got back their deposits still do not have snow throwers. They still want them." He went on to describe product movement of the past two model years.

"In 1978-79, we ordered about 150 units and sold them all. For 1979-80, we ordered about 300 units because the demand was so continuous in the two previous heavy snow seasons." He sold all 300 units, on paper, before Labor Day 1979. However, he said, due to late deliveries from the suppliers, he is carrying over about 60 two-stage snow throwers and 25 one-stage units.

Late deliveries a factor

Highway Sales had to return about 50 deposits due to late deliveries from suppliers, McNamara said. This dealer is an active member, and three-time president, of CLESDA (Chicagoland Lawn Equipment Servicing Dealers Assn.).

Highway Sales had to return the 50 deposits either because the person decided he did not want the

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"People who see this beautiful equipment in operation want to buy it."
Wilb Westermann, Elgin, Ill.

October - December snowfall

(Inches of snow, 3 month period, 15 cities)

	Historical Average	Last 10 Year Period Average	Last 10 Year Period High	Last 10 Year Period Low	Season 79-80	Season 78-79	Season 77-78
Boston	9.2	11.4	27.9	0	0.4	10.0	5.9
Buffalo	35.6	43.3	92.2	13.1	32.3	13.1	68.4
Chicago	14.7	19.5	38.5	1.5	5.7	38.5	25.5
Cincinnati	6.6	5.2	10.6	0.7	2.0	0.7	10.3
Cleveland	17.8	20.2	32.8	4.4	4.7	4.4	32.8
Denver	19.6	26.0	42.4	8.1	41.2	23.8	8.1
Des Moines	9.4	12.7	24.2	1.6	0.7	16.8	24.2
Detroit	14.5	18.5	42.6	6.8	5.5	12.7	24.0
Grand Rapids	28.1	29.0	39.4	18.6	12.0	36.2	33.8
Kansas City	5.6	5.0	11.9	1.0	Trace	11.9	1.2
Milwaukee	13.9	19.6	36.9	8.8	2.7	33.2	36.9
Minneapolis	15.7	21.3	39.4	7.3	8.8	31.6	28.9
New York	6.8	2.2	6.8	0	3.5	2.7	0.6
Omaha	8.6	10.4	20.4	4.0	3.5	7.6	4.0
Pittsburgh	12.8	12.8	28.9	5.5	2.2	5.5	12.4

SOURCE: The Toro Co.

Retailers struggle

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unit, or because he found one somewhere else before the model he wanted was delivered to the store.

One manufacturer, McNamara said, is going to alleviate the problem by accepting a 25 per cent down payment on the equipment and then refinancing the balance until Nov. 10, 1980. One large distributor in the Chicago area was picking up and warehousing its dealers' holdover units that were still in the box.

Although he knows some dealers who have hundreds of holdover units, McNamara's position is not that severe. He believes that the cost of carrying the inventory will be compensated for mostly by the fact that new units that would have been delivered for the 1980-81

In Chicago market

Servicing dealers report 30 per cent of units held over

A study of data provided by outdoor power equipment servicing dealers in the Chicago area shows that at the end of the model season, they still had 30 per cent of the year's inventory on hand. They sold almost 70 per cent of the units which they had available for sale during the year.

The study is based on data provided to **Lawn & Garden Marketing** by members of the Chicagoland Lawn Equipment Servicing Dealers Assn. in a survey conducted with the participation and cooperation of CLESDA.

At the beginning of the model year, March 1, 1979, these retailers had either zero or very low inventories. Seventy per cent of them began with zero inventory. The study shows that the retailers purchased a median of 200 units each during the model year, for resale to the public. (A median of 200 means that one-half of the dealers bought more and one-half bought fewer than 200 units.)

Of the units available for sale by the dealers, (units purchased, plus units held over from the previous season) they sold a median of 119 each, and held over a median of 70 units.

One-third of them had 100 or more units still in inventory at the end of the model year. Almost 20 per cent sold a significant volume—250 to 499—and, a handful of dealers sold 500 or more units.

Snow Thrower Inventory Study—Chicagoland Dealers

Number of units	CLESDA Members %
In Inventory—February 1979	
None	70.2
One	8.5
2 to 4	6.4
5 to 9	6.4
10 or more	8.5
Median Units	**0**
Purchased—1979 Season	
Less than 50	8.5
50 to 99	10.6
100 to 249	38.3
250 to 499	29.8
500 or more	12.8
Median (Units)	**200**
Sold—1979-80 Season	
Less than 50	12.8
50 to 99	31.8
100 to 249	29.8
250 to 499	19.2
500 or more	6.4
Median (Units)	**119**
In Inventory—February 1980	
Less than 10	14.9
10 to 49	21.3
50 to 99	29.8
100 to 149	17.0
150 or more	17.0
Median (Units)	**70**

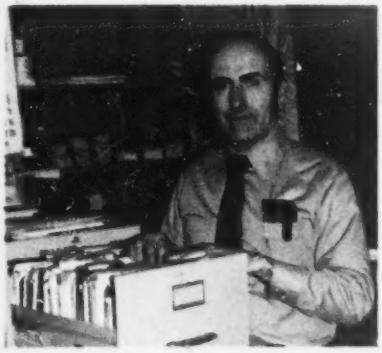
Per cent of 1979-80 Inventory Carried Over	%
Less than 10%	12.8
10% to 14%	8.5
15% to 24%	19.2
25% to 49%	40.3
30% or more	19.2
Less than 10 Units in Inventory	
February 1979	91.5
February 1980	15.9

Total membership	**Number of units**
In inventory—February 1979	180
Purchased—1979 season	26,160
Available for sale	26,340
Sold—1979-80 season	18,370
In inventory—February 1980	7,970

Disposition of units available for sale during model year	%
Sold	69.7
Carried over	30.3

Source: **LGM** Market Research

"I don't think this market is saturated at all." **Charlie McNamara**



season would have carried a price tag 10-12 per cent higher than the last order's. The biggest problem he sees is storage. Having to house the snow throwers just as the new shipments of lawn mowers are coming in is creating a problem.

Overall, McNamara is optimistic about the snow thrower market for servicing dealers in the Chicago area. "I don't think this market is saturated at all. The thing with snow throwers, though, is that there has to be a need," he said.

The snow came too late and too sparsely this year.

Discounter has 50 per cent sell through

One discount department firm serving the Chicago area has 3300 units held over in inventory.

"We will be buying very few this fall," said a merchandising executive for this firm. He added that the firm had only about a 50 per cent sell through of inventory, but that it had not attempted to promote them below costs to reduce inventory, as some mass retailers have done. This observer also doubts that the Chicago public will be receptive to early snow thrower sales. He feels they will be waiting to see whether there will be another mild winter.

On the other hand, he says, he feels there will be less competition from many quarters—many small dealers will be out of it completely, as will the auto dealers. He does not expect to see snow throwers being given away as premiums by automobile and appliance dealers.

This company is warehousing its 3300 holdover snow throwers in a location where they will have to be handled only twice: to put them in once, and to take them out once.

"You have to have the right kind of warehouse where you won't have to be handling them or moving them around," he said.

Storage cost: $4.50 per unit

"I can store them for 6 months for $4.50 apiece. That is less than the difference in the freight between last year and this year is going to be," he said. Another item on the plus side was a shipment of $28,000 worth of units he was able to shift to an area on the perimeter of the snow belt which felt the brunt of some heavy mid-winter storms while Chicago remained snow-free.

With the heavy snows of the previous year fresh in their minds, many customers purchased the two-stage units, this retailing executive said. "This year, however, a broom could have done the job," he commented. The power shovels are good for steps and small areas, but he finds that many buyers trying to use them for larger jobs "abuse them."

Customer information "essential"

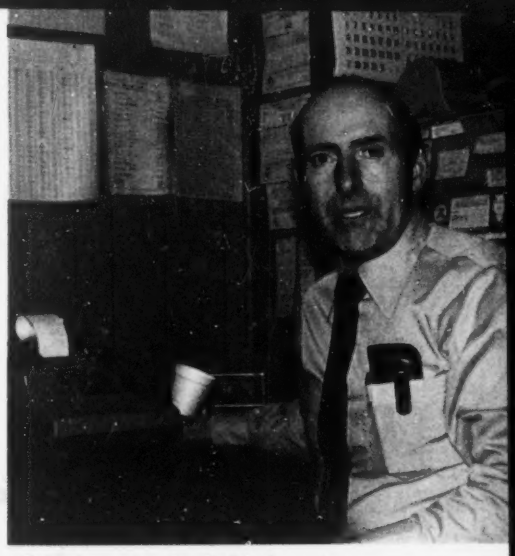
Another problem that concerns McNamara is delivery of this equipment to customers who are unfamiliar with it and do not know how to handle and maintain it. Calls on cold winter mornings from distressed customers who cannot start their units or are dissatisfied with performance have convinced McNamara and other servicing dealers of the critical need to provide information and instruction to the customer.

The president of CLESDA, Wilb Westermann, of Elgin, described the problem of servicing snow thrower customers who had purchased them "in a box" in the 1978-79 season.

"We had a rash of problems with uninformed customers. They are not mechanics. They did not put them together correctly. They gassed them up improperly. It is a new machine. It is under warranty. They louse it up. We get the hassle. Naturally, we try to help."

But, Westermann said, he "does not feel it is fair to sell these products to the public and not offer instructions or service."

Westermann described one of the common problems that customers bring into the shop: The blade or auger is clogged or frozen with snow or ice from being left out in the cold after use. By letting it thaw out in a warm area, the problem is resolved. It is not a mechanical problem at all, Westermann points out, just a failure to educate the new owner in some of the basic steps in maintenance and storage of the unit during winter.



"I had to give back 50 deposits to the customers because the equipment arrived too late. But, many of those people still do not have snow throwers, and they still want them."
Charlie McNamara

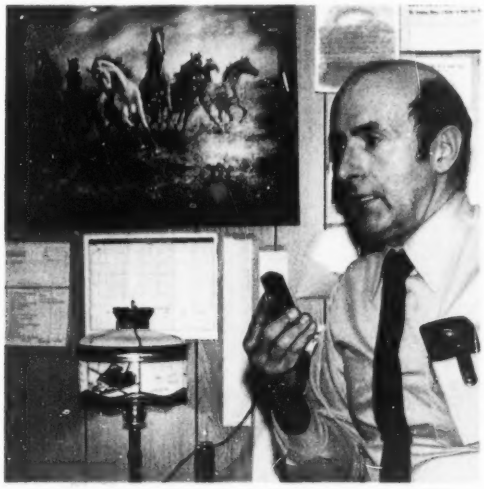
Like McNamara, Westermann said early season sales were good through October, November and into early December. But his full order did not arrive, and after December had passed and he received the balance of his machines, it was too late to sell to some of the customers who had made deposits.

"We had an order of 300 for this

continued on page 24

"We had a rash of problems with uninformed customers last year. They buy it in a box. They louse it up. We get the hassle."
Wilb Westermann

Charlie McNamara is known among his fellow members in the CLESDA as a "numbers man." He knows and uses statistics. He believes there should be more communications between manufacturers and retailers.



Retailers struggle

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season. Some of them came in after Christmas. The two-stagers, especially, came in late. The mass merchandisers got their supply earlier than we did. We gave back about 20 or 30 deposits because the customers became impatient."

Westermann, whose establishment, Wilb's Fix-It Shop, is located in Elgin, believes there is still a big market for snow throwers in the Chicago area.

"Beautiful equipment in use sells itself"

"It has not reached any point of saturation in this area, because housing is still growing. People who see this beautiful equipment work, and don't have a unit, want one. But the supply for next year is going to be a touchy one as far as I am concerned. We have inventory left over. The manufacturers have warehouses of them left over that they had to take back after getting them out too late, so we'll probably order lightly. It is a toss-up which way we will order."

Although Westermann objects to marketing strategies that encourage chain retailers to "sell it in a box" and not provide service, he has praise of the quality of the machines he handles. "We have very, very few faulty units. The inspection level at the factories has improved greatly through the years. Quality factors are important at the manufacturers' end of it," he said.

Even though there was a greater demand for the two-stage units early this year, Westermann weighs the advantages of the large units vs. the smaller one-stage snow throwers, and recommends the latter for most of his customers. Up to a 20-incher is more practical except for the very heavy snow that comes every 10 years, he said. The larger unit requires more space for storage, and more maintenance. He also see a good future for the power shovel.

He is concerned about price competition.

Westermann told of one discount retailer in his market area who was reducing inventory by selling 14-in. units that usually would sell for around $200 for $75. This outlet was selling 20-in. throwers, normally carrying a price tag of $259, for $159; and two-stage, 21-in. units which list at $499 for $250.

"That is very harmful to our industry because we can't afford just to sell these blowers at a ridiculously low percentage of our cost," Westermann said.

"In the 1978-79 season, we were cleaned out of snow throwers. We put in an order for 300 units for the 1979-80 season; our shipments did not come acceptably fast, especially the two-stage units. So, we did have to give back quite a few deposits. We sold only about two-thirds as many as we did last year. Which means we have about one third of our inventory left at this point. Our distributor is taking back about 50 per cent of our holdover inventory. They are going to warehouse it, and credit us for it. The distributor was taking back only the units in the shipping cartons. That will eliminate the bite on our financial end of it. The rest of the units, we will warehouse ourselves. We'll probably pay some interest on it. If we can get them paid off before the season hits again, which we probably will, we'll probably gain on that working against a price increase for the 1980-81 season," said Westermann.

Other sources told of mass retailers having to give back deposits because their snow throwers arrived too late. But some of the servicing dealers had specified on the sales agreement, when the deposit was made, that it was non-returnable. □

Manufacturers report

continued from page 16

between 20,000 and 25,000 attachments for lawn tractors and garden tractors remained in the distributor and dealer inventories.

By telephone interviews, **Lawn & Garden Marketing** obtained from marketing executives of several manufacturers their descriptions of plans to assist dealers in managing the hold-over inventories, and their overviews of the upcoming snow thrower selling season.

Here are their comments:

Manufacturers' viewpoints

Roger Stockseth, director of marketing for The Yard-Man Co., said that the manufacturers are helping the retailers manage the financial crunch they face with floor planning of holdover snow throwers.

"Every one of the companies is doing something for the dealers. They are doing it through the distributors, so it will vary from one (geographic) market to another. Each distributor is handling it in a different way.

"We have a two-part problem," Stockseth said. "One is the burden of carrying over inventory for a year. The distributors and manufacturers are sharing this burden with the dealer. The other problem is: How do we get the customer excited for the early-season sales?"

His company, Stockseth said, will be addressing this two-fold problem by pointing out that the season just completed is so unusual that nobody, not even the public, will expect another mild winter like this one for another 50 years. The homeowner, while enjoying the easing up of heating costs this year, Stockseth said, does not really expect that the 1979-80 snowfall will be any kind of a norm. Yard-Man will begin pointing out to the trade that there are approximately 44 million homes in the snow belt without snow throwers. This product category has been one of the fastest growing of all outdoor power equipment in the past 10 years he stresses.

Stockseth and others say that the 1979-80 season has proved to be the second greatest ever for snow thrower sales.

"More traditional marketing"

Jerry Stumbras, senior vice president, sales, for Gilson Bros., said he expects the marketing strategies by manufacturers to return to more traditional methods in terms of promotions, timing of promotions, etc. He expects there might be some very competitive pricing during the pre-season selling period due to the fact that those holding inventory will want to sell it before November.

Overall, Stumbras said, when you consider the sales year in comparison to other years, it is probably the second highest ever in number of unit and dollar sales. Due to its dependence on heavy snowfall within a given period each year, it is inherently a high risk business, he stressed.

Ted Behle, vice president of marketing for Atlas Tool Co., noted that company's production of snow throwers is not near the volume of some of the "biggies" in the industry. "We don't make that many. We have no place to go but up."

But, he said, it has been a sell-out year for Atlas, and he expects shipments by Atlas to continue to increase this season. This is partly due to the introduction of a 3-hp single stage unit. Most of Atlas' distributors were sold out, he said, and research by the company showed that at the retail level, the holdover of Atlas snow throwers was about 20 per cent.

Helping the dealers

Len Alexander of Simplicity Mfg. Co. said that all the manufacturers have a "re-dating" program. "We as manufacturers are trying to do everything we can to alleviate any hardship on dealers." Simplicity was in a good position because its shipments went out early, he said. "We did not have supplies to ship late in the season." As to the industry picture, Alexander said that despite some geographic areas with "pretty high inventory levels," other market areas were sold out of snow throwers this year. A dealer in

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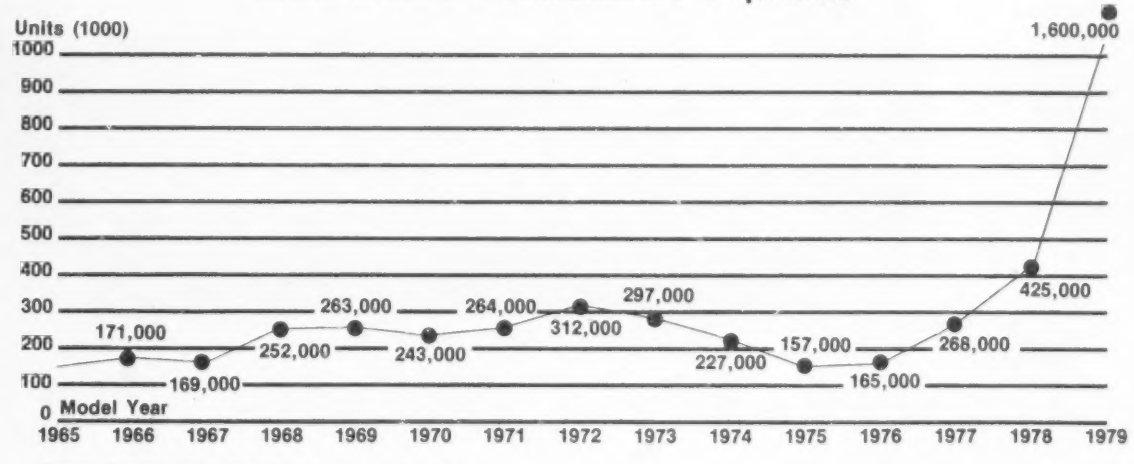
Snow thrower manufacturers' shipments



Source: Outdoor Power Equipment Institute and industry data.

Manufacturers report

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the business for the first year in Greeley, Colo., for example, sold 150 units this year. Alexander is advertising and sales promotion manager of Simplicity Mfg. Co.

"A profitable business"

Mike Ariens, president of The Ariens Co., said, "We're trying to remain aggressive as to the total retail outlook. We're stressing to our dealers that they're in the marketing business. Where our distributors are being very aggressive, they're making progress reducing inventory with special promotions." Ariens said.

Stressing the positive side, and the long range picture, Ariens said, "We've all grown very fast in this (snow thrower) market. It has been profitable for the distributors and dealers. It has given the dealer a lot of profit."

"We like the business," he continued. "But, we have to motivate the people. It is unlike last year when the public came looking for the units. Now we have to sell and maybe that is good for us."

Pre-season sell-through "best ever"

"Our retail activity was better than ever last year," said Mike Hughes of Outdoor Power Equipment Div., Bolens-FMC Corp. He said that pre-season sell-through was the best it has ever been. However, even though dealers sold more than ever, the holdover from last season comprises 40 per cent of what they will need for the upcoming snow thrower sales season.

Hughes described a number of ways in which the company is planning to help the dealers manage the new season: There is a rebate program giving the customers additional incentive to buy; if a customer buys a mower, he will get a $25 coupon which can be applied to the purchase of a snow thrower or could be used for the purchase of other Bolens equiment, this company spokesman said. "Our credit people are going to help dealers by extending floor plans, or whatever it takes."

Hughes said that the company's work with dealers this year would be concentrated less on product and more on freight, financial programs and other retail management subjects.

Said Warren Thrun, president of MTD Products Inc., "We had a very clean sell-out. Our products moved through pretty fast. But, we all sink or swim together."

"Has the consumer's mind been turned around? Will he wait until the first heavy snow before buying?" These are questions that Jacobsen Mfg. Co. is studying in planning its marketing strategy for the year, said Roy Beatty. The question of inventory and marketing strategy will have to be studied area by area, he said. Even the mid-March snowfall was helping in some areas, he said. As of press time, Jacobsen marketing executives were conducting meetings with distributors and dealers to plan strategy for the next snow thrower sales season. Beatty is Jacobsen's manager of communications.

Toro: Demand is still there

"I think it is very important that we recognize this as a very successful selling year despite the low snowfall," said David Cox, vice president and general manager of Toro's Consumer Equipment Division. There were more snow throwers sold at retail than ever before, he said. Unit volume for the company was up about 20 per cent.

"The demand that we all sensed at the beginning of the year is still there," he said. Cox stated that consumer demand had been built in recent years by advertising and promotions. Toro maintains that the market in the snow belt for snow throwers is less than 25 per cent saturated.

In discussing the distribution and inventory holdover situation in the Chicago area, Cox referred not to "consumer demand" but "consumer pressure for snow equipment" following the record snowfall of the 1978-79 winter which brought 80 inches of snow that lasted for months.

The Toro Company estimates that, industry-wide, there were between 1.6 and 1.7 million walk-behind snow throwers shipped for the season. It estimates that between 35 and 40 per cent of the units shipped remain in inventory at the dealer and distributor level. □

The indoor green scene enters the '80s

By Debra Miller Kim

Most mass merchandisers, retailers and growers seem to agree that the indoor foliage boom of the past few years is over. Sales are increasing steadily but slowly, and plants as a vital feature of interiorscaping are here to stay.

■Sales appear to have stabilized in the indoor foliage industry, but opinions differ as to the reasons.

Wanda Zedekar, part-owner of Pershing's Garden and Florist, Muncie, Ind., says that many plant owners now have all the green plants they need. They have had time to become educated in plant care, so the plants they have are staying alive and healthy, she said.

In Cucamonga, Calif., Baseline Garden Center is located in a new housing district. Although owner Floyd Manzer says his sales continue to increase steadily, people are not buying as many indoor plants as they used to.

"When people are making $700 to $800 mortgage payments each month for the new homes they're building, there isn't much left to spend on plants. They usually will landscape the outside of their home first," he said.

For wholesalers last year, sales increased but profits decreased, according to Dennis Murray, executive vice president of the Florida Foliage Association. Some growers still are selling at about 1960 prices, he said.

But on the whole, the year was good; fewer growers went out of business than in past years, he said. He predicted that the market would continue to be good the next few years.

See page 64 for related article on indoor foliage plants.

Outlook good

Most retailers and wholesalers

continued on page 72

Photo by Alan Swenson.

Product groups defined

PLANTS

POTTING MEDIUMS
All-purpose
African violet
Cactus
Charcoal
Terrarium sands/gravel
Vermiculite

PLANT FOODS
Liquid chemical
Liquid organic
Powdered organic
Powdered chemical
Timed-release capsules

POTS/TERRARIUM CONTAINERS
Pots, by material types
Ceramic
Clay
Glass
Metal
Peat
Plastic
Straw
Wicker
Wood
Terrarium containers

PLANT GROOMING AIDS AND DISEASE CONTROLS
Fungicides
Insecticides
Leaf polishes

LIGHTS AND LIGHTING FIXTURES

PLANT DISPLAY FIXTURES AND FURNITURE
Brackets
Display cabinets
Fixtures/furniture
Shelving
Stands/tables

MISCELLANEOUS ACCESSORIES
Gloves
Hanging harnesses
Hanging harness materials
Mist sprayers
Sprayers
Tools
Watering devices

PLANT CARE BOOKS

Indoor green scene

continued from page 68

share Murray's optimism, but for different reasons.

Steve Ross, Botanical Systems, Inc., Excelsior Springs, Mo., (a suppliers for retailers) said he firmly believed that the market would increase—for reputable firms. Fly-by-nights and those with poor quality plants will not survive, he predicted.

Manzer has seen several short-term firms come and go in the 9 years he has been in his present location, a shopping mall in Cucamonga.

"They sell plants cheap, but the quality isn't good and they can't afford to offer the accessories that we do. Those factors give us an edge," he said.

Consumers' views of plants have changed in the past few years, giving the industry added stability. Marian Patrizio, Plant Care, Cambridge, Mass., says that consumers now think of plants as investments, much like other home furnishings. For that reason, her business has been doing well. People want to take care of their plants, she said.

Archie Amate, Superior Nursery Co., Gardena, Calif., also has seen an increase in plants used as important features of home and office decor. Superior is a wholesale nursery that maintains its plants after they are purchased.

"People can't afford to build as much as they used to. So they remodel. Usually, plants are featured in some way in that redesign," he said.

One garden center manager, William Easton of Vaughan's Garden Center, Western Springs, Ill., says he is just a firm believer in cycles. The business will continue to grow for the next 2 or 3 years, he said, but then it will drop off as he has seen it do many times in the past.

Trends

The day of all-green indoor foliage decor is gone, Murray said. Color, whether in foliage or blooming plants, is the most noticeable trend this year.

Ross said that he had noticed a definite increase in sales of blooming plants, especially violets and orchids. While the sale of hanging baskets has leveled off, blooming plants in hanging baskets are bringing sales back up, he said.

Amate said that more and more of his customers were requesting colorful plants for primary areas, such as a lobby or reception area. In this same vein, exotic plants are selling well, according to Murray.

"A few years ago, people didn't know what a dracaena was. Now the public is educated. They are aware of what plants are available, they know how to care for them and they're requesting the unusual ones," he said.

Consumers now are willing to pay more for a quality plant that will not die a few weeks after they bring it home, according to several retailers. They are becoming more conservative, using fewer but better quality plants.

Larger plants, 6- to 10-in. and 14-in. and larger, are also selling well, reflecting the increased use of plants in home decor.

"In every decorating magazine these days you see large plants used effectively in homes," Patrizio said.

One trend that reflects the increasing cost of fuel is a tightening of service by plant care specialists. Amate services several customers in the Los Angeles area. Because of ever-increasing fuel costs, he has made his service routes more efficient by rerouting and doubling up on service calls, and in some cases cutting back from two to one visit each week.

The customers understand, he said.

Patrizio agreed that the cost of fuel has affected her service program. Better communication between customers and maintenance firms is one answer, she said.

E. F. Scarborough, Federal-State Marketing News Service, noted after interviewing two buyers who had an unusually successful demand last November and December

Indoor Plants and Accessories

Preliminary Data*

Carry indoor plants and accessories	Mass Merchandisers 1979 %	Mass Merchandisers (Projected) 1980 %	Garden Centers 1979 %	Garden Centers (Projected) 1980 %
INDOOR PLANTS	50.0	50.0	67.4	67.4
Annual Sales Volume				
Less than $1000	8.8	—	19.7	12.2
$1000 to $4999	11.8	19.4	24.9	23.7
$5000 to $9999	2.9	—	16.5	20.1
$10,000 to $24,999	23.6	22.6	17.8	18.7
$25,000 or more	52.9	58.0	21.2	25.3
$5000 or more	74.9	80.6	55.4	64.1
$10,000 or more	76.5	80.6	38.9	44.0
INDOOR PLANT ACCESSORIES	81.9	81.9	74.8	74.8
Annual Sales Volume				
Less than $1000	7.5	8.1	30.3	25.9
$1000 to $4999	12.5	5.4	39.3	36.7
$5000 to $9999	25.0	29.7	8.5	12.2
$10,000 to $24,999	12.5	13.5	8.5	10.8
$25,000 or more	42.5	43.3	13.4	14.4
$5000 or more	80.0	86.5	30.4	37.4
$10,000 or more	55.0	56.8	21.9	25.2

*How to read: 50% of mass merchandisers carry indoor plants; 77.4% of them sold $5000 or more and 76.5% sold $10,000 or more in 1979.

Source: Lawn & Garden Marketing survey.

that merchants were willing to use more space for plants during the Christmas season because profits from traditional holiday items were unusually low. The stores advertised extensively and keyed on impulse buying during the holiday season when store traffic was heaviest.

Other trends mentioned were more men buying plants and more consumers buying several kinds of the same plant species to create a theme effect.

Mass merchandisers

One spokesman for a mass merchandising firm said that some mass merchandisers had been cutting back on the amount of plants bought because of short shelf life and a lack of trained personnel.

"Right now, we look for promotional ideas and unusual selling items to catch the consumer's eye," he said.

During the indoor foliage boom, according to Ross, discount stores displayed their plants in the front of the store. Now they have cut back and are placing their plants in the back of the store.

But Murray disagrees that most mass merchandisers are cutting back.

"Statistics can be misleading," he said. "Most aren't really cutting back. They are buying fewer units, but the units they buy are of better quality, some even with a 75 per cent longer shelf life. So the amount bought is really the same. They are also buying larger plants in decorative pots, something that consumers are willing to pay more for."

A spokesman for one major chain department store said that his company currently is in the process of totally revamping its indoor foliage line.

"We are studying our market and aiming for a totally different target market than other mass merchandisers," he said. "We have studied the market and can't see that any mass merchandisers are making a profit; everyone has been too concerned with volume. Super-high markdowns don't help. We are also upgrading our accessories. Right now, only 10 per cent of our line is selling up to par."

He said his company will have the first results of its marketing tests next spring.

One supermarket chain is not cutting back but enlarging its indoor foliage department by putting full-service floral shops in most of its new stores. The key, according to company spokesmen, is well-trained personnel who do nothing but take care of the plants. Although blooming plants sell well, basic green foliage still is their best-seller.

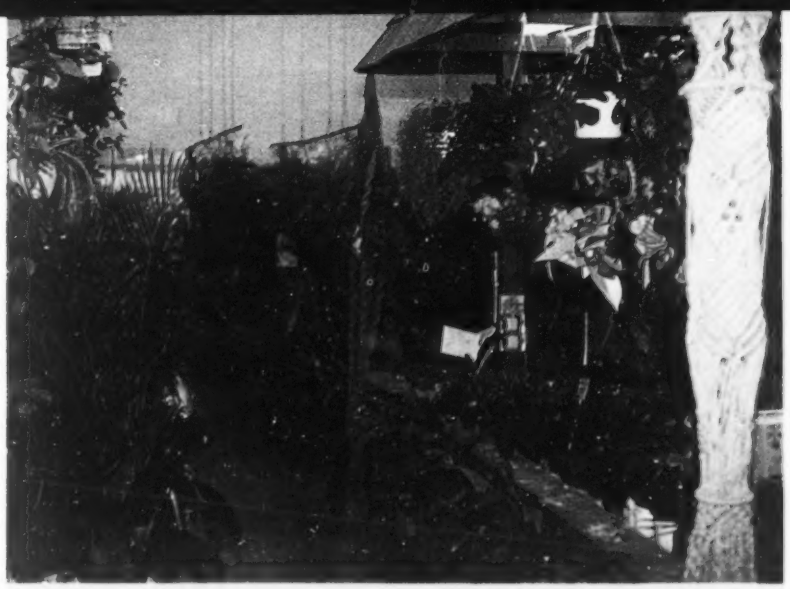
Interiorscaping

One improvement that Patrizio and other plant care specialists would like to see is better communication between themselves and architects.

continued...

Indoor green scene

...continued



Relationship of Incomes and Indoor Houseplant Activities

Annual income	Indoor houseplants
Over $20,000	53%
Under $20,000	42%

Source: Gardens for All/Gallup Organization Survey.

Indoor Houseplant Activities 1978-1979

	1978 %	1979 %
Total U.S.	44	45
Men	28	31
Women	59	58
18-29 years	50	46
30-49 years	45	49
60 and over	41	41
East	44	45
Midwest	50	48
South	36	37
Far West	50	54
College	55	57
High School	45	43
Grade School	26	29
Professional	57	60
Business	64	53
Clerical & sales	40	53
Manual	42	42
Non-labor force	35	38

Source: Gardens for All/Gallup Organization Survey.

Often architects think plants are too much trouble, or put an expensive plant in a breezy entryway and it dies, she said. Architects need to consult plant care firms and they will find that plants are really not that much of a problem in interior design.

To help remedy the problem, the Interior Plantscapers Association, founded in February 1979, has published a pamphlet entitled "How to select and work with an interior plantscape specialist." The pamphlet is directed toward anyone who needs help in including and maintaining plants in an indoor design. It lists steps to follow in choosing a specialist, the process used in most interior planting situations and the variety of services that a specialist can offer. Copies are available from the Interior Plantscape Association, 11800 Sunrise Valley Dr., Reston, VA 22091.

The IPA also is working on regional seminars, an Annual Meeting and Trade Show to be held Sept. 18-21, and a *Manual of Practice.*

Tightening credit

Earlier this year, the Florida Foliage Association and the National Association of Credit Managers developed the FFA Credit Group. FFA members pay a fee to join, and every quarter they report their past due accounts to the Credit Group. The list of names is compiled by computer, published and mailed to the members for reference. Information given includes name, amount owed and any legal action taken. Other services available include a collection agency and a toll free number to call for further information.

Murray said the group was formed not only because of fly-by-night buyers, but also because of other buyers on the wholesale level who would purchase large amounts and then not pay the grower for 6 months. The growers, who had employees to pay and other expenses, were losing ground, he said.

In 6 months the group will try to go national, but at this point NACM's computers are not capable of handling that many members. □

Lawn & Garden Marketing

JUNE/JULY, 1980

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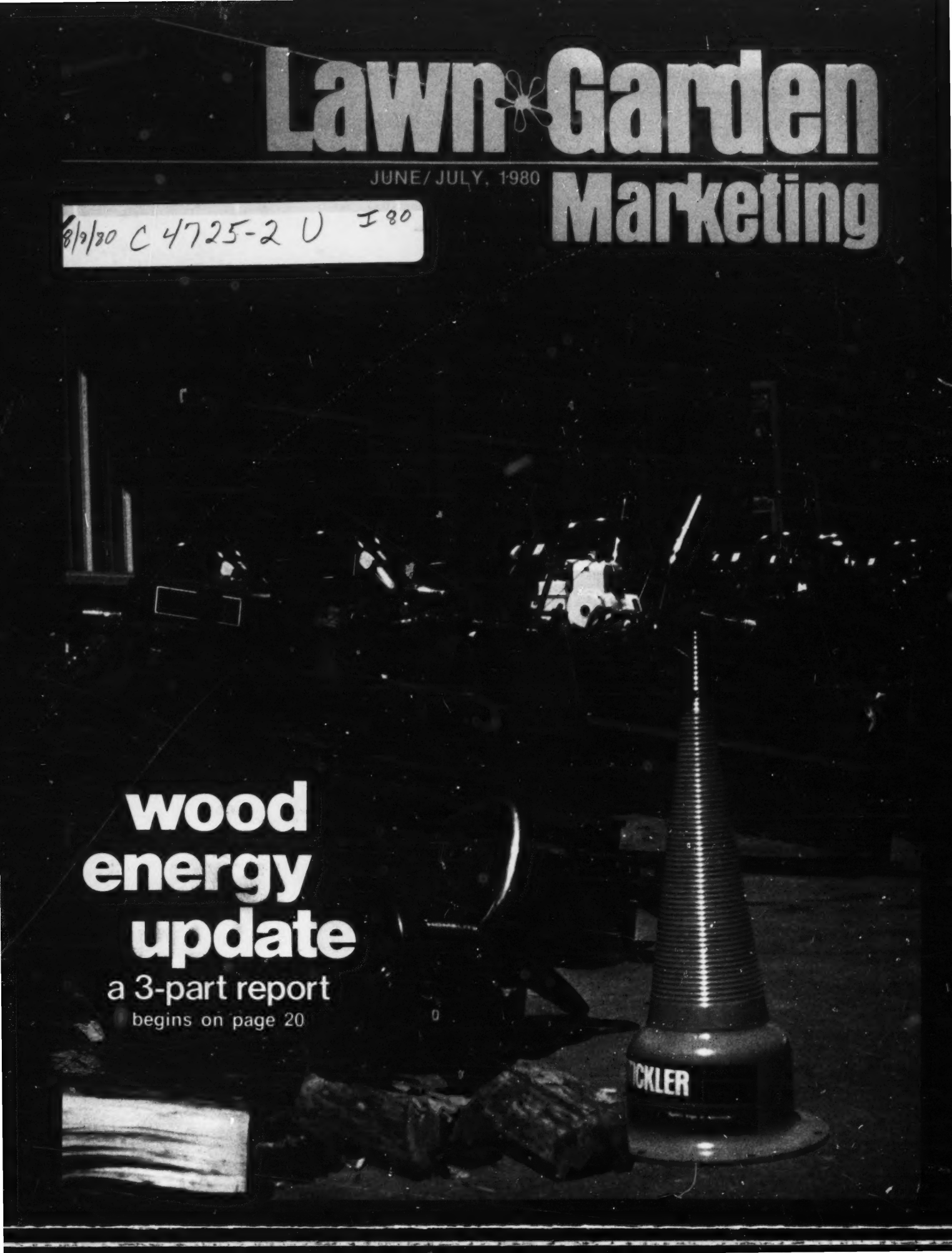

wood energy update

a 3-part report

begins on page 20

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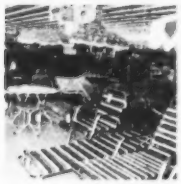

14 Turning a patio into a party area. This is the fourth in a series of articles focusing on how retailers can help make their customers' dreamed-of projects become reality.

16 Mower standard deadline a short 17 months away. The safety issues have narrowed and time is short until the effective date of the new standard. By Frank Buckingham.

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22 Part 2. Retailers' guide: How to select a line of stoves. By Tom Dease.

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COMING IN THE AUGUST ISSUE:
Coverage of the National Hardware Show including Guide to Exhibits and Product Showcase. Also, descriptions of the major shows slated for this fall and an article on how to work a trade show.

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New Gallup data:

Wood gains as heat source

This is Part 1 of a three-part report in the issue on wood as a home heating source, and products associated with the harvesting and burning of wood.

Other articles cover:
Part 2. How to select a line of woodstoves. Page 22
Part 3. A Wisconsin dealer who finds a profit center in energy products. Page 28

Also in this issue:
Power Data Package
Chain saws—technical data Page 34
Log splitters—industry trends and equipment specifications Page 40

Equipment ownership for wood harvesting/splitting

(Asked Of All Wood-Burning Households)

	Total per cent	Projected Number of Households
Axe	35	7.1 mill.
Chain Saw	30	6.1 mill.
Wedge	16	3.3 mill.
Saw	11	2.3 mill.
Power Saw	7	1.4 mill.
Sledge hammer	7	1.4 mill.
Maul	5	1.0 mill.
Splitter	4	800,000
Hatchet	2	400,000
Misc. others	6	1.2 mill.
Don't know	6	1.2 mill.

Source: Gallup Org., Inc./Garden Way, Inc./Wood Energy Institute.

■Just how much of a market for wood-burning equipment is there, and how are consumers reacting?

Consider these facts from a recent survey conducted by the Gallup Organization Inc. and commissioned by Garden Way, Inc. and The Wood Energy Institute:

- 23 per cent or 18 million American households, have at least one working fireplace; 3 million of this group have more than one.
- The total potential for residential wood heat usage is 18 to 23 million homes.
- 7 per cent, or 5 million households, have a working woodstove.
- Four or five years ago, appearance was a priority consumer concern regarding the purchase of wood heat equipment. The current trend, however, is toward practical, efficient and safe cost-conserving heat.
- The regions where fireplace ownership is the

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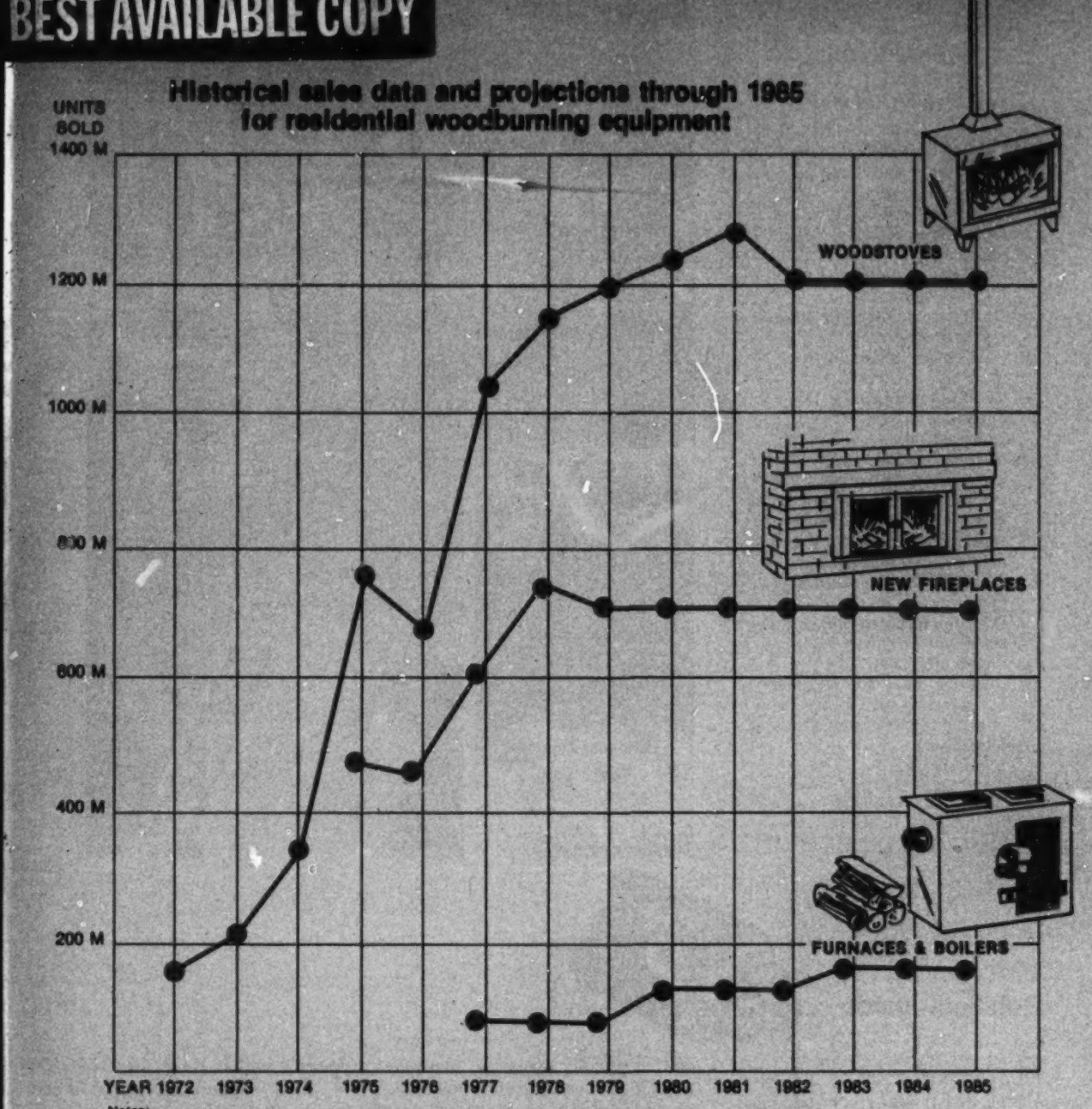
Historical sales data and projections through 1985
for residential woodburning equipment
UNITS SOLD
1400 M
1200 M
1000 M
800 M
600 M
400 M
200 M
WOODSTOVES
NEW FIREPLACES
FURNACES & BOILERS
YEAR 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983 1984 1985
Notes:
1. Sales projections are for wood-burning equipment installed in privately owned, single family residences.
2. Sales trends are based on extrapolations of historical sales trends and on discussions with industry associations and manufacturers.
Source: Gallup Org., Inc./Garden Way, Inc./Wood Energy Institute.

highest are the Rocky Mountain and Pacific States. The Southern and East Central States are lowest.

- In terms of woodstove ownership, New England leads the list (17 per cent). The Middle Atlantic (4 per cent) and Pacific States (1 per cent) are at the bottom.
- An estimated 50 million cords of wood were burned in American homes last year...an average of about two cords per wood-burning household.
- About 5 million homeowners are currently giving "a great deal of thought" to buying a woodstove in the next year or so. This boils down to approximately 1.2 million very likely buyers.
- The potential of repeat sales of wood heat devices to current stove and fireplace insert owners is approximately twice that of sales to non-owners. □

Log splitter industry report...

Growth anticipated for next 4 years

Many consumers are turning to wood as a less costly heating fuel. Increased log splitter sales indicate those consumers are discovering that splitters can ease the job of handling firewood.

by Debra Miller Kim

According to sources in the log splitter industry, between 85,000 and 95,000 log splitters were sold in the United States last year. The projected figure for 1980 is 115,000, and sales are expected to increase for the next 3 to 4 years.

Ever-increasing fuel costs have triggered this renewed interest in wood energy. In turn, sales of wood-related products, such as log splitters, have also increased.

Best seller

The most popular selling log splitter is the hydraulic. Of the approximately 90,000 units sold last year, almost 70,000 were hydraulic models with gas engines. Twenty-thousand were electric splitters and other types, including screw-types run from a vehicle's hub, self-contained engine or tractor PTO.

Approximately 85 per cent of log splitters used last year were purchased by consumers. The remaining 15 per cent were purchased or rented by professionals.

Log splitters sold best in the Northeast, where the population is greatest and fuel prices highest. However, in Texas and the Carolinas, the amount of splitters being sold is increasing. One reason may be the high proportion of all-electric homes, in which heating costs run high, in that area.

The majority of splitters sold last year were hydraulic models with gas engines.

Advantages

Consumers and professionals purchase log splitters for several reasons, the most obvious being speed. The typical homeowner using a hydraulic splitter can split 200 logs each hour. Small logs are easier to transport than large, awkward tree limbs and more of the tree can be used for fuel. Waiting to split wood until it is frozen, not green and stringy, is no longer necessary, and wood split in one season can be used that same season.

Consumers consider several factors before purchasing a log splitter:

- How much and what type of wood will be split?
- What log length is needed?
- Will the splitter be transported from place to place?
- How much money can be spent?

Unpowered units sell for under $100; small, self-contained units from $400 to $600; highway-mobile units up to $1500; and commercial units up to several thousand dollars.

Types

Hydraulic log splitters can be powered by a gas engine, electric motor, tractor hydraulic system or PTO or a chain saw engine. The hydraulic system advances a ram that forces the log against a wedge; some splitters have multiple-wedge attachments that split logs into three, four or five pieces. A lever is pulled to return the ram; some models feature an automatic return.

continued...

Log splitters

...continued

The entire process is called the cycle time. Splitters usually average between 10- and 20-sec. cycles.

Hydraulic splitters can be mounted in a number of ways. Some have highway-mobile tires; others are equipped with only off-road tires or trailer or tractor hitches. Some stationary splitters fit in a car trunk or truck bed.

Screw-type splitters feature a conical screw, sometimes mounted on an auger, that threads into the side of a log, breaking it apart. Logs can be fed into the splitter continuously. The power source can be a gas engine or tractor PTO, or the drive hub of a car, truck or tractor. The vehicle's tire and wheel may or may not need to be removed to attach the splitter, depending on the model.

Some screw splitters have off-road tires or tractor or trailer hitches; others are stationary. □

Auger-type splitters usually are run from a tractor PTO. A screw threads into the log, breaking it apart.

Log splitters carried
(% of total power equipment)

Mass merchandisers	11.1
Garden centers	8.3
Hardware stores	22.9
Power equipment retailers	51.5
Total	24.4

Source: Lawn & Garden Marketing survey

Months log splitters purchased

Months	Hardware/ Home Centers %	Power equipment retailers %
January	5.4	2.5
February	2.7	3.8
March	5.4	6.3
April	13.5	12.5
May	18.9	1.3
June	8.1	16.3
July	5.4	16.3
August	13.5	22.5
September	18.9	26.3
October	27.0	17.5
November	8.1	3.8
December	2.7	1.3

*Adds to more than 100.0% because of multiple responses.

Source: Lawn & Garden Marketing survey

Manufacturer	Model	Power source	Splitting method	Length of log to be split (inches)	Weight
Albright Corp. Jeffersonville, VT 05464 **Circle (60) on Reply Card**	26-, 50-in. 26-, 50-in. 26-, 50-in. 26-, 50-in.	tractor hyd. tractor PTO 8 hp gas 10 hp gas	hyd. hyd. hyd. hyd.	26, 50 26, 50 26, 50 26, 50	450, 620 650, 750 600, 800 700, 900
Amerind-MacKissic, Inc. P.O. Box 111 Parker Ford, PA 19457 **Circle (61) on Reply Card**	LS105, 247, 2910	gas eng.	hyd.	21, 25, 30	283, 440, 705
Arnold Industries, Inc. 3011 Council St. Toledo, OH 43606 **Circle (62) on Reply Card**	Stickler SV100 Stickler ST300	vehicle tractor PTO	screw screw	36-48 36-48	31 69
Bachtold Bros. Inc. 619 N. Center St. Forrest, IL 61741 **Circle (63) on Reply Card**	gas electric	5 hp gas electric motor	hyd. hyd.	25½ 25½	— —
Bark-Buster, Inc. 14508 21st. Ave. N. Minneapolis, MN 55441 **Circle (64) on Reply Card**	BA3 BA5 GT BA4	tractor PTO gas eng. garden tractor vehicle	auger auger auger auger	24 24 24 24	100 125 100 145
Beaird-Poulan 5020 Flournoy/Lucas Rd. Shreveport, LA 71109 **Circle (65) on Reply Card**	26-10, 10R 19-7 26-TM	5 hp gas 5 hp gas tractor hyd.	hyd. hyd. hyd.	26 19 26	315 135 208
Cornell Mfg., Inc. Rt. 2, Box 18 Laceyville, PA 18623 **Circle (66) on Reply Card**	WS-19, 24, 24-H, 32, 32-H WS-24-3, 32-3	5, 8 hp tractor hyd.	hyd. hyd.	19, 24, 24, 32, 32 24, 32	260, 380, 430, 500, 530 300, 380
Danuser Machine Co. 500 E. 3rd Fulton, MO 65251 **Circle (67) on Reply Card**	MS-1, 2 TB-16/MS-1, 2	tractor hyd. 16 hp gas	hyd. hyd.	28, 48 28, 48	248, 390 553, 695

continued...

Log splitters ...continued

Manufacturer	Model	Power source	Splitting method	Length of log to be split (inches)	Weight
Didier Mfg. 8630 Industrial Dr. Franksville, WI 53126 **Circle (68) on Reply Card**	A19M, A26M, B26M, C26A, C38A, C50A	5 hp gas	hyd.	19, 26, 26, 26, 38, 50	156, 275, 279, 318, 374, 430
	X26A	8 hp gas	hyd.	26	1000
	T26A	tractor hyd.	hyd.	26	215
Engineering Products Co., Inc. 2021 MacArthur Rd. Waukesha, WI 53186 **Circle (69) on Reply Card**	Power King	tractor hyd.	hyd.	26	285
Flowtron Div., Automatic Radio 2 Main St. Melrose, MA 02176 **Circle (70) on Reply Card**	Flowtron	2 hp elec.	hyd.	25	130
Futura 5069 Highway 455 West Bend, WI 53095 **Circle (71) on Reply Card**	HLS19, 24	gas eng.	hyd.	19, 25	120, 165
	SHL24	gas eng.	hyd.	25	200
FXG Corporation 3 Sullivan St. Woburn, MA 01801 **Circle (72) on Reply Card**	Super Split Jr.-24	gas or elec.	rack-and-pinion	25½	285
Gilson Brothers Co. P.O. Box 152 Plymouth, WI 53073 **Circle (73) on Reply Card**	Power Bolt	5-hp gas	mechanical wedge	26	370
Huss Sales Inc. 1929 Starr Ave. Toledo, OH 43605 **Circle (74) on Reply Card**	10801, 10305, 10405	8 hp gas	hyd.	48, 26, 26	—, 390, 475
	10350	5 hp gas	hyd.	26	335
	10602	—	hyd.	26	625
	10651	12 hp gas	hyd.	26	638
	10101	5 hp gas	hyd.	20	—
	10701, 10901	tractor hyd.	hyd.	26, —	—
Knotty Wood Splitter Mfg. Co. Route 66 Hebron, CT 06248 **Circle (75) on Reply Card**	Knotty Wood	tractor hyd.	hyd.	30	—
Kubota Tractor Corp. 550 W. Artesia Blvd. Compton, CA 90220 **Circle (76) on Reply Card**	B-310	tractor PTO	screw	variable	79
La Font Corporation 1319 Town St. Prentice, WI 54556 **Circle (77) on Reply Card**	MMS-350, 350T, 400, 400-36, 400-50	gas eng.	hyd.	24, 24, 24, 36, 48	410, 475, 525, 760, 850
	MTS-350, TS-400, 400-36, 400-50	tractor hyd.	hyd.	24, 24, 36, 48	295, 385, 475, 550
	LS-500, 500-50	gas eng.	hyd.	24, 48	1350, 1650
	SS-500	gas eng.	hyd.	24	1550
LEECO Mfg. Inc. P.O. Box 331 Calimesa, CA 92320 **Circle (78) on Reply Card**	Woodchuck	chain saw	hyd.	19	89
Lindig Mfg. Corp. 1875 W. County Rd. C St. Paul, MN 55113 **Circle (79) on Reply Card**	SPH524	5 hp gas	hyd.	24	500
	SHP526	5 hp gas	hyd.	26	850
	SPH1626	16 hp gas	hyd.	26	1300
Magna American Corp. P.O. Box 90 Raymond, MS 39154 **Circle (80) on Reply Card**	Timber-Splitter	gas eng.	screw	26	158
G. E. Mann Inc. 511 E. Main St., Box 273 Campbellsport, WI 53010 **Circle (81) on Reply Card**	GS-18, 76-C, 76-CHD	5 hp gas	hyd.	18, 24, 24	173, —, 300
	TR-24, TA-24, TRP-24	tractor hyd.	hyd.	24, 12	—
	PL-24	8 hp gas	hyd.	24	—
	PL-24MC	16 hp electric	hyd.	24	—

continued...

Log splitters ...continued

Manufacturer	Model	Power source	Splitting method	Length of log to be split (inches)	Weight
MTD Products, Inc. Box 36900 Cleveland, OH 44136 **Circle (82) on Reply Card**	241-645, 642, 640	6, 5, 3.5 hp gas	hyd.	26, 24, 24	395, 360, 350
Northeast Industries, Inc. 23 Birch St. Midland Park, NJ 07432 **Circle (83) on Reply Card**	Screw-Wedge Screw-Wedge	9, 8 hp gas tractor PTO	screw screw	48 48	280, 210 280, 210
Paragon Products, Inc. 3601 Cindy Lane Seven Hills, OH 44131 **Circle (84) on Reply Card**	LCS-101, 201, 301	11, 8, 5 hp gas	hyd.	26	750, 375, 275
Piqua Engineering Inc. P.O. Box 605 Piqua, OH 45356 **Circle (85) on Reply Card**	16ABS19 25ABS25 26EK30 26MK34F 26MK52F 36LK36 60LK102 60LK84	5 hp gas 5 hp gas 8 hp gas 8 hp gas 8 hp gas 12 hp gas 12 hp gas 12 hp gas	hyd. hyd. hyd. hyd. hyd. hyd. hyd. hyd.	19 25 30 30 48 36 102 60	186 265 445 555 585 1135 1495 1250
SAK Mfg., Div. of El Fuego Corp. 30 Lafayette Square Vernon, CT 06066 **Circle (86) on Reply Card**	Log Aug Log Aug PTO	vehicle tractor PTO	screw screw	— 24	100 90
Siebring Mfg. Co. 303 S. Main George, IA 51237 **Circle (87) on Reply Card**	Siebring	gas eng.	hyd.	24	625
Special Products Co. 15000 W. 44th Ave. Golden, CO 80401 **Circle (88) on Reply Card**	LS400103, 301, 302, 306, 307, 303	tractor PTO, 5 hp gas	hyd.	38, 26	250, 415, 398, 415, 372, 372
The Thackery Co., Inc. 1820 Frebis Ave. Columbus, OH 43206 **Circle (89) on Reply Card**	Unicorn Mark PTO-3 Unicorn Mark SP1005 Unicorn Mark 1 Unicorn Mark G2 Unicorn Mark G	tractor PTO 5 hp gas vehicle garden tractor vehicle	screw screw screw screw screw	— — — — —	79 125 99.5 59 59
Trans-America Power Equip. 14801 Auburn Rd. Newbury, OH 44065 **Circle (90) on Reply Card**	Easy Split	gas engine	screw	18	140
Tri-Star Corp. Rt. 3, Illini St. Vandalia, IL 62471 **Circle (91) on Reply Card**	HW-20	tractor PTO	hyd.	24	180
Vermeer Mfg. Co. P.O. Box 200 Pella, IA 50219 **Circle (92) on Reply Card**	LS-50, 100 LS-200	tractor hyd. gas eng.	hyd. hyd.	32 32	570, 575 1100
W-W Grinder Inc. P.O. Box 4029 Wichita, KS 67204 **Circle (93) on Reply Card**	W-W LS530	5 hp gas	hyd.	30	450
Yard-Man Co. P.O. Box 36100 Cleveland, OH 44136 **Circle (94) on Reply Card**	24645 24642	8 hp gas 5 hp gas	hyd. hyd.	26 24	400 340

Lawn & Garden Marketing

AUGUST, 1980

FARWEST NURSERY SHOW
Seattle Aug. 24-28

NATIONAL HARDWARE SHOW
Chicago Aug. 10-14

GARDEN INDUSTRIES of AMERICA CONFERENCE (GIA)
Baltimore
Sept. 12-14

NATIONAL LAWN & GARDEN DISTRIBUTORS ASSN. (NLGDA) CONVENTION and SHOW
Los Angeles
Sept. 16-18

MID-SOUTH LAWN and GARDEN EQUIPMENT SHOW
Memphis Aug. 27-29

PACIFIC HORTICULTURAL TRADE SHOW
Long Beach
Sept. 17-19

TAN-MISSLARK
Houston Aug. 16-19

FLORIDA NURSERY and ALLIED TRADES SHOW (FNATS)
Tampa Sept. 26-28

SHOWS ISSUE

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***Publishing dates are as follows:** Monthly January through April; one issue each in June, August, October and November; two issues in September.

14 **Prime time shows coming soon.** Presented here is information about national and regional lawn and garden trade shows that will be held from August to November.

24 **Power Equipment Highlights.** Introducing a new department which will cover current topics in the outdoor power equipment industry.

27 **Guide to Exhibits.** An alphabetical listing of exhibitors of lawn, garden and outdoor living products at the National Hardware Show. This guide also includes dates, times, location and a floor plan of the Lawn, Garden and Outdoor Living Division.

35 **35th Annual National Hardware Show: Organizers predict biggest show ever.** Once again manufacturers, retailers, distributors, and others will gather in Chicago's McCormick Place for this gigantic show which kicks off the industry's show and buying season.

38 **Hardware Industry Week Seminar Schedule.** This year more than 2600 persons are expected to attend the popular programs.

46 **Product Showcase.** Merchandise to be exhibited at the National Hardware Show's Lawn, Garden and Outdoor Living Div. is pictured and described in this feature. It replaces the regular Product Briefs department.

76 **Equipment manufacturers' eyes on the future.** This article reports on the annual meeting of the Outdoor Power Equipment Institute and the issue which most concerns them—the walk-behind mower safety standard.

100 **Project Profile: Growing plants to conserve energy.**

110 **How to work a show.** An exclusive interview with Aaron Lessans, president of Commerce Distributors in which he describes how he and his associates make the most of the National Hardware Show.

118 **Marketing on purpose through planning.** Arnold Bernstein, director of marketing of Frank's Nursery Sales, made the keynote presentation at the Landscape/Garden Center Management Clinic in Louisville. Here are selected topics from that speech.

DEPARTMENTS

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COMING IN THE SEPTEMBER ISSUE:
Merchandising outdoor furniture, cookery and patio accessories; an exclusive interview with the new OPEI president; and, a report on the status of the Nursery Marketing Council.

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Equipment

■The overall economy plus the cost and the viability of equipping walk-behind mowers with a brake-clutch were major concerns for members of the Outdoor Power Equipment Institute as manufacturers in this association gathered for their annual meeting at Lake Tahoe, Nev., in June.

The OPEI staff and committee members reported on actions in the courts and in negotiations with the Consumer Product Safety Commission to stop, or at least to delay, the implementation of the safety standard now being proposed by the CPSC.

As it now stands, the CPSC would require the installation of a brake-clutch on walk-behind mowers to stop the blade within 3 seconds after the mower user's hands were removed from the handle-bars.

"We've got our hands tied. We are faced with government intervention, and we have become an industry of importers," lamented Tony

"Do not base your business decisions solely on the general economy."—Larry Chimerine.

manufacturers' eyes on the future

Malizia, retiring president of the association.

While continuing the effort to minimize the impact of government legislation on costs and sales, the manufacturers emphasize that they are "not negative about safety."

"The OPEI stands for a safe product," they state, pointing out the voluntary standards that have been implemented through the years.

Dennis C. Dix, executive director of the OPEI, said that an appeal is being made to extend the effective date of the mandatory standard from Dec. 31, 1981 to June 30, 1982.

In requesting the extension of time and other measures to alleviate hardships for the industry, Dix said that the economic impact on manufacturers and retailers will be pointed out to the court considering the matter. The current economic conditions—recession and unemployment—may have some effect in persuading the government to ease the regulations, it is felt.

Stan Byers, newly elected president of the OPEI, cited four basic activities in which the association will be involved in the next year:

- Assisting the industry in coping in the world market. This will include monitoring imports and assisting U.S. manufacturers interested in exporting;
- Legislative and regulatory involvement;
- Consumer relations and education; and
- Funding the association.

1981 industry outlook

The current recession is "consumer driven" and the retailers, faced with uncertain futures, will be unwilling to carry the quantities of units in inventory that they have in the past, it was stated in an industry forecast presented during the meeting. Retailers will rely more on manufacturers to carry inventory beyond the key selling season.

continued...

Eye the future

...continued

There will be no over-building of field inventories during this period, but sales will continue to occur "since a large part of our products are replacement products," it was stated.

Data for the forecast were gathered from OPEI members during April of this year. The information from the participating members was analyzed and used for the 1981 Industry Outlook presented during the meeting by executives of The Toro Company: David McLaughlin, chairman and chief executive officer; John J. Cantu, president; and Kendrick Melrose, group vice president, Outdoor Products Group.

Melrose cautioned the members to remember that the data were gathered in April, when the outlook for housing starts and other economic indices were more optimistic than they were in mid-June.

Twenty-three member companies participated in the survey. Here is the overview of the economic conditions for the 1980-81 season as forecast by these 23 manufacturers and summarized by The Toro Company executives:

"Overall, members foresee a recessionary economy during 1981, characterized by sluggish growth in the Gross National Product, rising unemployment and continuing double-digit inflation. Membership consensus is that housing starts will continue at a moderate level and that growth in consumer disposable income will be very low compared with historic norms.

"Member companies surveyed forecast that the economic recession will result in a decrease in lawn and garden product shipments in 1980-81.

"However, due to the industry's projected restraint in shipping during the 1979-80 season, the 1980-81 decrease is expected to be moderate compared with the precipitous declines of the previous recession.

"Thus, the industry should be in a strong position to take full advantage of the economic recovery when it arrives...." (See the table for details of shipment forecast.)

Thomas

New decade will be different: Chimerine

Economist Larry Chimerine, of Chase Econometrics, told the manufacturers, "Do not base your business decisions solely on what is happening in the general economy. People will be spending their money differently in the 1980s than they did in the '70s."

He said that in the mid-1980s, there will be a boom in the U.S. housing industry based on growth in the number of people in the prime age bracket for buying houses—in the 30s. He said also that mortage interest rates will be coming down, and that there will be downsizing: shorter vacation trips, smaller cars, smaller house lots.

In the short term, this economist

continued...

Court rules against OPEI

Ten days following the conclusion of the OPEI annual meeting, the association was notified by the Fifth District Court in New Orleans, that the OPEI's petition to set aside the proposed CPSC standard was denied.

The standard, requiring the installation of a blade clutch designed to stop the mower blade in three seconds, still stands. Also, the date of Dec. 31, 1981 for the new standard to go into effect remains the same.

It is expected that the manufacturers' association will continue the effort to delay the effective date until technical and economic problems associated with the standard can be worked out.

The June/July issue of **Lawn & Garden Marketing** carried an in-depth analysis of the standard, and the effects it would have on sales and on the industry.

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Eye the future

...continued

said that unemployment will reach 9 per cent or a little higher by the end of this year, but the economic recovery will also begin late this year.

"We will get a modest pick-up, but not a rip-roaring recovery we usually see after a recession," he said. In the six post-war recessions, the rate of growth of the Gross National Product has been 7.9 per cent during the first year. This time, the growth will be 2.9 per cent in GNP the first year of recovery from the recession, said Chimerine.

"Never before has industry responded so quickly in liquidating inventory," as in this recession, he stated. This was due to high interest rates. It should have the effect of shortening the recession, he said.

Good news about noise control

Henry E. Thomas, director of Standards and Regulations Div., Noise Control Program of the Environmental Protection Agency, commended the OPEI on its voluntary program of labeling mowers on noise level produced by the individual units. He said he would like to see this program be nationally successful for mowers, and possibly imitated by other non-related products.

"The issuance of a regulation limiting the noise level of lawn mowers would not be worth the expenditure that would be necessary to implement a national noise control standard."

He reminded them that the Noise Control Act of 1972 grew out of legislation that was initiated in state and local governments in the 1960s, and had the support of the National Assn. of Manufacturers and the U.S. Chamber of Commerce.

He said that lawn mower noise is "not the most pernicious problem today." He said, however, that manufacturers interested in the export market should be aware of the stiff regulations that Germans

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Laxalt

Industry Shipments

(000 Units)	(Seasonal Year) 1979	Projected 1980	Forecast 1981
Walk behind power mowers	5,900	5,625	5,400
Lawn tractors/riding mowers	858	786	739
Garden tractors	254	228	208
Walk behind tillers	571	572	570

SOURCE: 1981 Industry Outlook made by 23 OPEI members in Apr. '80.

and other Europeans are putting on mower noise and safety.

The concluding speaker of the meeting was U.S. Sen. Paul Laxalt of Nevada, who said, concerning government regulations of business and industry: "We are better off than we were; we'll be better off in the 1980s." To emphasize the broad base in Washington for curbing the regulators, he reminded OPEI members that the cosponsor, with him, on the Regulatory Reform Bill was Sen. Ted Kennedy. Laxalt is a leader in the Ronald Reagan presidential campaign.

(See the new department in this issue, POWER EQUIPMENT HIGHLIGHTS, for more news about the OPEI, shipments, and other information about the power equipment business.) □